



BOY SCOUTS
OF AMERICA®

SILICON VALLEY MONTEREY BAY COUNCIL

STRATEGIC PLAN

2022 - 2027



MISSION STATEMENT

THE MISSION OF THE BOY SCOUTS OF AMERICA IS TO PREPARE YOUNG PEOPLE TO MAKE ETHICAL AND MORAL CHOICES OVER THEIR LIFETIMES BY INSTILLING IN THEM THE VALUES OF THE SCOUT OATH AND LAW.

VISION STATEMENT

THE BOY SCOUTS OF AMERICA WILL PREPARE EVERY ELIGIBLE YOUTH IN AMERICA TO BECOME A RESPONSIBLE, PARTICIPATING CITIZEN AND LEADER WHO IS GUIDED BY THE SCOUT OATH AND LAW.

SCOUT OATH

ON MY HONOR I WILL DO MY BEST
TO DO MY DUTY TO GOD AND MY COUNTRY AND TO OBEY THE
SCOUT LAW;
TO HELP OTHER PEOPLE AT ALL TIMES;
TO KEEP MYSELF PHYSICALLY STRONG, MENTALLY AWAKE,
AND MORALLY STRAIGHT.

SCOUT LAW

A SCOUT IS:

TRUSTWORTHY
LOYAL
HELPFUL
FRIENDLY
COURTEOUS
KIND
OBEDIENT
CHEERFUL
THRIFTY
BRAVE
CLEAN
REVERENT



Contents

STRATEGIC PLAN 2022-2027

Leadership Team	1
Introduction	1
Key Performance Objectives	2
Program	3
Membership.....	5
Unit Service	7
Finance	9
Marketing	11
Leadership & Governance	13
Properties	15



STRATEGIC PLAN LEADERSHIP TEAM

Chair

Dan Knappenberger

Council President

Mark Lazzarini

Membership

Bob Wedig

Unit Service

Carmen Fuller, Jeff Thompson

Leadership and Governance

Andy Ratermann

Properties

Todd Trekell

Marketing

Hal Hendrickson

Program

Kathi Lucas

Finance

Chris McGugan

Advisors

Jason Stein, Dianne Betz,
Margaret Caldwell, Heather
Lerner, Steve Solberg, Eric
Tarbox, Michael Wilson

Introduction

The Silicon Valley Monterey Bay Council Executive Board is proud to present this document which outlines the council's strategic plan for 2022 - 2027.

Since we were chartered by the National Council BSA in 1920, we have focused on delivering high-quality Scouting experiences to the youth in our community. Throughout this term, we have undergone many challenges and changes; however, we stand here today focused on continuing our mission to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law. This document provides the roadmap on how we plan to achieve that mission in our community.

To help chart our path forward, the strategic plan is structured around seven key areas of focus: *program, membership, unit service, finance, marketing, leadership & governance, and properties*. Just like our history has demonstrated, it will take a concentrated effort by all members of the council's Scouting community to achieve the goals outlined in these seven focus areas.

By realizing the goals outlined in these seven focus areas by 2027, we hope to have extended our Scouting mission to the growing and diverse community that we serve and to have provided greater opportunities for youth to participate in Scouting, regardless of their family environment, economic situation, religion, race, or ethnic background. Additionally, we intend to continue cultivating partnerships with organizations, businesses, foundations, and individuals within our community at large.

The strategic plan will be a central focus of the council board, and starting in 2022, progress updates will be regularly provided at board meetings. We sincerely appreciate you taking the time to read, ask questions, and support the plan. Your thoughts, perspectives, and feedback are always welcome.

Yours In Service,
Silicon Valley Monterey Bay Council Executive Board



Key Performance Objectives

More youth, robust programs, incomparable support

Growth:

1. Recover Covid & LDS membership losses and exceed 12,979 members by 2027.

Assets:

1. Fundraise (Capital Campaign) and acquire a new home for the main Council office and program center.
2. Recover from settlement trust bankruptcy payout and grow total assets to exceed \$60m.

Inclusion & Diversity:

1. Develop youth membership demographics that better reflect our community, especially female and Latinx populations.
2. Develop a diverse leadership team that better reflects the diversity of the youth and communities that we serve.

Partnerships:

1. Identify new charter partners to recover Covid & LDS unit losses and exceed 410 units by 2027.
2. Partner with our community on a new Council-wide service project that focuses on building reputation and brand.

Reputation:

1. Elevate and strengthen youth protection and be a community leader by organizing a community forum on youth safety.



Program

Objective Goal #1: Provide innovative Cub Scout daytime program opportunities that meet the needs of our Scout families and leaders.

Supporting Action Items:

- Increase the percentage of Cub Scouts who attend a daytime camp experience by 2% annually. (Measurement formula: Total # of Campers/ Total # Cub Scout participants)
- Introduce one new innovative Cub Scout daytime program annually starting in 2023.
- Create a task force to provide direction for current and future offerings by 2024.
- Expand existing Cub-O-Ree program with new troop partners by holding one troop-led day program per year per district by 2027.

Objective Goal #2: Expand access to overnight camping opportunities that are exceptional and inviting where new campers are welcomed and encouraged.

Supporting Action Items:

- Increase the percentage of Cub Scout families who attend a Council-led overnight experience by 2% annually. (Measurement formula: Total # Campers / Total # of Cub Scout participants.)
- The Camping Committee will design and provide First-time Camper Orientations twice a year, starting in 2023, and provide two First-Time Camper family camps per year by 2025.
- The Council will provide updated and easy-to-access resources for camping locations in the Council through an annual review and promotion process.
- Introduce four new programs at Camp Hi-Sierra by 2027.
- Increase camping days at Council properties by 2% annually.

Objective Goal #3: Be more visible in our communities by providing new Council-wide service opportunities.

Supporting Action Items:

- Have a robust Activities & Civic Service Committee with 100% participation and representation from all districts and the community to improve access to and inclusiveness within our programs by 2024.
- Districts will identify and promote one service opportunity per every 20 units in the district by 2027.
- Create a notification and collection process for data, photos, and testimonials of service done in the community to be used to enhance awareness of service rendered by 2024.
- Increase youth and adult total service hours by 2% annually.
- Create a task force to research and consider a new Council-wide service opportunity by 2023. Hold new opportunity by 2024.

Objective Goal #4: Increase the percentage of trained direct-contact leaders by providing meaningful resources that allow them to deliver a quality program.

Supporting Action Items:

- Build and maintain four Cub training teams that consistently provide Cub leader training: Two basic leader training teams, one BALOO team, and one specialty-and-advanced training team
 - 1 team by 2023
 - 2 teams by 2024
 - 3 teams by 2025
 - 4 teams by 2027
- Council Training Committee to review how training and resources are communicated in the Council and make recommendations to improve processes for distribution of training by 2023.
- Increase the number of direct contact position-specific Cub Scout leaders trained annually, year-over-year, achieving 70% by 2027.





Membership

Objective Goal #1: Increase membership 36% by 2027.

Supporting Action Items:

- Hire a Membership Growth Executive (Bilingual in Spanish) by 2024.
- Hold biannual Council Recruitment Workshops by 2023.
- Create a peer-to-peer recruitment program including a recruitment incentive by 2022.
- Partner with a sports/entertainment partner to sponsor a membership drive by 2025.

Objective Goal #2: Address barriers to joining Scouts BSA.

Supporting Action Items:

- Create four new units each year in underserved areas.
- Generate and maintain a map of unit locations by 2022.
- Offer a low-cost, class-B Scout shirt as a joining incentive to underserved youth by 2024.

	Projection 2022	2023	2024	Forecast 2025	2026	2027
MEMBERSHIP:						
Cub Scouts	4,000	4,461	4,800	5,152	5,550	6,000
Growth		11.5%	7.6%	7.3%	7.7%	8.1%
Scouts BSA	4,934	5,100	5,268	5,400	5,520	5,679
Growth		3.4%	3.3%	2.5%	2.2%	2.9%
Venturing	210	220	230	250	275	300
Growth		4.8%	4.5%	8.7%	10.0%	9.1%
Exploring	375	500	600	750	900	1,000
Growth		33.3%	20.0%	25.0%	20.0%	11.1%
Total	9,519	10,281	10,898	11,552	12,245	12,979
Growth		8.0%	6.0%	6.0%	6.0%	6.0%
UNITS						
Cub Scouts	132	144	149	156	171	186
Scouts BSA	168	175	180	186	192	197
Venturing	34	35	36	39	42	45
Exploring	28	33	32	36	41	42
Total	361	387	398	417	445	470
Growth		7.1%	2.8%	4.8%	6.7%	5.7%

Objective Goal #3: Increase the percentage of ethnic communities served by Scouts BSA to match the area's demographics.

Supporting Action Items:

- Establish an Underserved Ethnic Community (USEC) Recruitment Committee by 2023.
- Have a presence at ethnic events by creating a calendar for units to register and represent Scouting by 2024.
- Create a Council Latinx chartering organization and Scouting affinity group by 2025.

Objective Goal #4: Bring to parity the number of boys and girls served by Scouts BSA.

Supporting Action Items:

- Establish an Advisory Committee by 2023.
- Increase girl-only packs by two in 2022.
- Create a marketing plan to highlight and promote female role models for girls in the Scouts BSA by 2024.
- Hold a girl-only Cub Scout Cub-O-Ree by 2025.





Unit Service

Objective Goal #1: Divide the Council up into the optimal number of Districts with the appropriate number of professionals and volunteers to provide a best-in-class service experience.

Supporting Action Items:

- Improve Total Available Youth (TAY) ratio to one Unit-Serving Executive per 35,000 TAY by 2025.
- Establish a task force in 2022 to conduct an analysis and develop a proposal for redistricting to be implemented in 2023.
- Develop a strategy by 2023 to initiate, cultivate, and maintain working relationships with school administrators and other leadership blocks (e.g., church leaders, CASA, Liên Đoàn, etc.) to retain existing units and create new unit opportunities.

Objective Goal #2: Utilize technology and our Council-wide talent pool to create consistent content and improve the quality and attendance at our Roundtable meetings across the Council.

Supporting Action Items:

- Roundtable will become a joint venture between the Council and the Districts by 2023.
- The Council Commissioner will recruit an Assistant Council Commissioner of Roundtable in 2022.
- Develop a plan to utilize meeting technology to increase attendance and participation by 2023.



Objective Goal #3: Nurture the Commissioner community to build a stronger, more cohesive Commissioner team resulting in engaged, knowledgeable, and enthusiastic Commissioners.

Supporting Action Items:

- Hold annual training sessions for District Commissioners on how to conduct a meaningful District Commissioner's meeting by 2022.
- Hold a Commissioner's Open House in each district by 2023.
- Contact each unit a minimum of six times per year including one detailed assessment by 2024. Two contacts should be in person, and four contacts may occur via phone, Zoom, or meaningful email or text exchange.
- Hold a spring Zoom meeting hosted by the Council Commissioner for all commissioners as a forum for distributing information and Q&A by 2023. This will supplement the existing autumn Commissioner Conference.
- Add a Commissioner's Pledge to the Commissioner Breakout at the January District Leadership Conference to reinforce the Unit Commissioner commitment by 2023.

Objective #4: Direct unit support and service.

Supporting Action Items:

- Create a scholarship fund by identifying and engaging individuals/corporations to support the fees for new underserved units by 2023.
- Determine whether a Commissioner's Challenge for Unit Commissioners is feasible; if so, design and propose the program by 2023.





Finance

Objective Goal #1: Increase total direct support of the Operating Fund to \$3,000,000 annually.

Supporting Action Items:

- Form a task force to evaluate annual giving (i.e., Friends of Scouting) to the Operating Fund by June 2022.
- Roll out and implement Board-approved recommendations from the task force no later than 2024.
- Increase corporate support 10% per year from matching gifts through 2027.
- Increase foundation operating support to \$200,000 annually by identifying 30 new and renewed private, corporate, and family foundations by 2027.

Objective Goal #2: Recover from the settlement trust bankruptcy payout and increase total assets to \$60M.

Supporting Action Items:

- Increase Endowment Fund assets by \$5 million, by 2027, through the following means:
 - Addition of 30 new or-leveled up Heritage Society members each year.
 - Addition of \$1 million in deferred estate plans each year.
- Improve camp properties as needed through capital fundraising.
- Maintain investment account principal and increase growth at 7% annually (2% post-draw to the Operating Fund).

Objective Goal #3: Fundraise (capital campaign) and acquire a new home for the Council office and potential Scout campus.

Supporting Action Items:

- Include a Treasury member on the ad hoc Campus Committee, which is developing the plan for a Council campus, by 2022.
- Develop a capital-campaign fundraising plan, including a feasibility study by summer of 2023.
- Raise 50% of capital-campaign needs by 2024.
- Raise remaining capital-campaign funding needs by 2026.

	Budget 2022	2023	2024	Forecast 2025	2026	2027
Support						
FOS						
Golden Eagle	\$325,000	\$352,368	\$375,037	\$398,750	\$417,129	\$429,643
Field	\$675,000	\$729,000	\$749,558	\$754,805	\$760,088	\$765,409
Special Events	\$870,655	\$940,307	\$996,726	\$1,036,595	\$1,057,327	\$1,078,473
Foundations & Trusts	\$83,000	\$100,000	\$125,000	\$150,000	\$175,000	\$200,000
COVID Relief						
Other Support	<u>\$468,780</u>	<u>\$487,531</u>	<u>\$502,157</u>	<u>\$517,222</u>	<u>\$532,739</u>	<u>\$548,721</u>
TOTAL Support	\$2,422,435	\$2,609,207	\$2,748,478	\$2,857,371	\$2,942,283	\$3,022,246
Revenue						
Popcorn	\$360,000	\$388,800	\$412,128	\$436,856	\$463,067	\$490,851
Draw from Endowment	\$1,207,960	\$1,175,000	\$1,247,499	\$1,325,313	\$1,404,695	\$1,489,333
Camping	\$1,119,880	\$1,231,868	\$1,293,462	\$1,345,200	\$1,399,008	\$1,454,968
Activities	\$320,320	\$345,946	\$366,703	\$388,705	\$412,027	\$436,749
Other Revenue	<u>\$239,089</u>	<u>\$248,652</u>	<u>\$256,112</u>	<u>\$263,795</u>	<u>\$271,709</u>	<u>\$279,860</u>
TOTAL Revenue	\$3,247,249	\$3,390,266	\$3,575,903	\$3,759,869	\$3,950,506	\$4,151,762
TOTAL INCOME ("A")	<u>\$5,669,684</u>	<u>\$5,999,473</u>	<u>\$6,324,382</u>	<u>\$6,617,240</u>	<u>\$6,892,789</u>	<u>\$7,174,008</u>
Employee Costs:						
Current Team	\$3,221,345	\$3,317,985	\$3,417,524	\$3,520,050	\$3,625,652	\$3,734,421
New Headcount	\$0	\$214,240	\$282,730	\$390,650	\$402,369	\$414,440
Professional Fees	\$463,908	\$477,825	\$492,160	\$506,925	\$522,133	\$537,797
Program Expenses	\$478,242	\$497,371	\$517,266	\$537,957	\$559,475	\$581,854
Occupancy/Camp Expenses - Pd by Fund 2/3	\$0	\$0	\$0	\$0	\$0	\$0
Occupancy/Camp Expenses	\$515,707	\$531,178	\$547,114	\$563,527	\$580,433	\$597,846
Other Expenses	\$952,315	\$980,884	\$1,010,311	\$1,040,620	\$1,071,839	\$1,103,994
TOTAL EXPENSES ("B")	<u>\$5,631,516</u>	<u>\$6,019,484</u>	<u>\$6,267,105</u>	<u>\$6,559,729</u>	<u>\$6,761,901</u>	<u>\$6,970,352</u>
NET CHANGE IN UNRESTRICTED ASSETS (=A-B)	<u>\$38,168</u>	<u>-\$20,011</u>	<u>\$57,277</u>	<u>\$57,511</u>	<u>\$130,889</u>	<u>\$203,656</u>
Operating Fund to Unrestrict Endow	-\$97,441	\$20,011	-\$57,277	-\$57,511	-\$130,889	-\$203,656
Beginning Unrestricted Net Assets	\$309,274	\$250,000	\$250,000	\$250,000	\$250,000	\$250,000
ENDING UNRESTRICTED NET ASSETS	<u>\$250,000</u>	<u>\$250,000</u>	<u>\$250,000</u>	<u>\$250,000</u>	<u>\$250,000</u>	<u>\$250,000</u>



Marketing

Objective Goal #1: Measurably increase the positive perception of Scouting in the broader Council community by 30% through greater community outreach.

Supporting Action Items:

- Set a measurable baseline for the perception of Scouting in our Council by 2022.
- Identify and implement steps to change public perception annually starting in 2023.
- Annually review and measure changes, then implement new steps to increase positive perception.

Objective Goal #2: Develop unique strategies to accelerate membership growth in diverse communities of our Council.

Supporting Action Items:

- Participate in the Underserved Ethnic Community (USEC) Recruitment Committee, as established by the Membership Committee, by 2023.
- Identify and implement unique marketing strategies to approach each community by 2024.
- Review and measure outcomes of the strategies by 2025 - 2026.

Objective Goal #3: Find, engage, and build a network of “Influencers” who will use social media to promote the Scouting program in specific areas and communities.

Supporting Action Items:

- Identify and engage 25 influencers and assist them with developing a habit of sharing Scouting activities on their social media by 2022.
- Identify a reward system for social-media influencers by 2022.
- Increase the number of impressions on social media based on a benchmark from 2022 by 2022 - 2025.

Objective Goal #4: Develop a marketing research study that will demonstrate a quantifiable Return on Investment (ROI) for involvement in Scouting to potential corporate donors.

Supporting Action Items:

- Investigate the possibility of engaging one of the local universities that would like to help with this level of research by 2024.
- Fund this level of research through a “Grant Program” to a department or professor by 2026.





Leadership & Governance

Objective Goal #1: Elevate and strengthen youth protection with 100% trained volunteers.

Supporting Action Items:

- Evaluate costs/benefits of a full-time employee serving as Youth Safety Director by 2023.
- Make Youth Protection a significant part of marketing strategies within the annual Council marketing plan by 2023.
- Host an annual youth-safety seminar for community (external) agencies/organizations by 2025.
- Remove registered members who are not current with Youth Protection Training after 60 days implementation by 2022.
- Comply with Section Business and Professional Code 18975 (AB506) by 2022.

Objective Goal #2: Ensure high-quality succession planning is accomplished at Council & Districts annually.

Supporting Action Items:

- Create a mentorship program for new Council-level volunteers by 2024.
- Update quarterly a three-year succession-planning chart focused on identifying succession gaps and accountability management by 2022.
- Develop an ongoing training plan for new and existing Board leadership by 2023.
- Implement Council- and District-level volunteer two-way self-evaluations of position and performance satisfaction by 2022.

Objective Goal #3: Diversify leadership to better reflect youth and the communities we serve.

Supporting Action Items:

- Create a Board-approved annual plan by 2023 that sets objectives for women on the Board and an overall increase in ethnic diversity.
- Create an ongoing prospect list of potential Board members who fit diversity needs and encourage them to serve on Council-level committees and introduce them to Council leadership roles by 2022.
- Create culturally focused marketing materials that explain Scouts BSA and our Council and the values of volunteering by 2025.
- Develop annual evaluations and recommendations of staff, setting objectives to reflect community diversity by 2023.
- Develop an annual training plan for staff designed to help them better understand and communicate effectively with diverse populations, completed by 2024.

Objective Goal #4: Review district and Council leadership structures to optimize organizational effectiveness.

Supporting Action Items:

- Increase ongoing focus by all Board members and Board Development Committee to identify and recruit influential community and Scouting leaders to the Board and Districts.
- Create a task force to evaluate and review District boundaries and structure by 2023.
- Create a task force to review the Board's organization chart, roles, and responsibilities by 2022.
- Review all Council committees for attendance, need, and structure by 2024.





Properties

Objective Goal #1: Determine a future Council headquarters and potential program center combination, otherwise known as a campus.

Supporting Action Items:

- Form a special committee to determine a plan, identify potential properties, and make recommendations to the Board beginning in 2022.
- Identify how the Council office is currently used by stakeholders (staff, youth, parents, community, Board, etc.) by 2022.
- Develop a Board-approved plan by 2023, and purchase property by 2024.
- Design, entitlements, and ground-breaking by 2026.

Objective Goal #2: Identify both short- and long-term maintenance, capital improvement, and financing strategies to maintain and possibly expand the Camp Chesebrough Scout Reservation by 2023.

Supporting Action Items:

- Define future of Chesebrough (expansion, and/or improvement of the user experience).
- Conduct an asset-management, life-cycle review for maintenance and capital improvement needs that align with the future use of Chesebrough.
- Set expected life determinations for major assets and calendar the rebuild and replacements.

Objective Goal #3: Establish an access and maintenance model for Camp Hi-Sierra that expands the usage and functionality to deliver year-round programming opportunities for Scouting and outside groups by 2023.

Supporting Action Items:

- Review surveys from customers by 2022.
- Develop a year-round access plan to overcome road and weather conditions by 2023.
- Create a business plan for outside groups, including insurance, programming, cost, and staff needs by 2023.

Objective Goal #4: Develop a first-class Properties Committee to undertake the scope of needed projects at all Council properties.

Supporting Action Items:

- Recruit influential construction-industry professionals who can leverage their contacts to provide in-kind resources (both skilled labor and materials) to maintain and build world-class facilities throughout our Council.
- Create a Camp Host Team for each property, focused on upkeep and maintenance (Camp Chesebrough by 2023, Camp Hi-Sierra by 2024, and the future campus by 2027).





BOY SCOUTS OF AMERICA®
SILICON VALLEY MONTEREY BAY COUNCIL

Council Service Center (Main Office)
408.638.8300 | www.svmbc.org

Monterey County Trading Post
831.287.2020 | www.svmbc.org