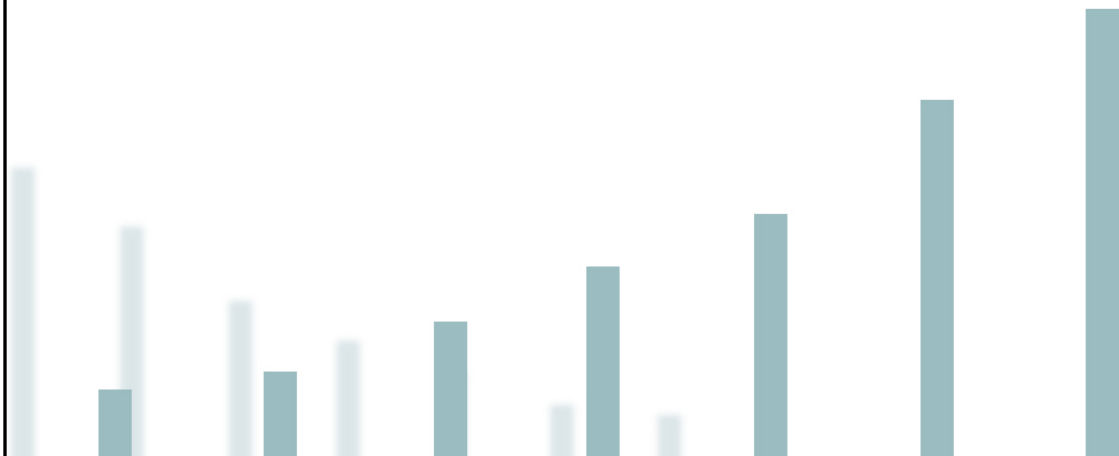


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# The Big Sister Association of Greater Boston

Growing rapidly while maintaining quality



## Summary

As the Big Sister Association of Greater Boston has grown, the agency has worked hard to maintain quality, to manage its relationship with the national Big Brothers Big Sisters of America organization, to expand its funding from individuals, and to transfer operational control increasingly from its executive director to a chief operating officer. Effective metrics, a strategic plan, good partnerships, and strong management talent have helped propel growth.

## Organizational snapshot

**Organization:** The Big Sister Association of Greater Boston

**Year founded:** 1951

**Headquarters:** Boston, Massachusetts

**Mission:** “To help girls realize their full potential by providing them with positive mentoring relationships with women.”

**Program:** BSAGB’s signature program matches girls ages 7 to 15 (Little Sisters) with female volunteers (Big Sisters) to create friendships in which girls feel listened to, understood, and supported. The matches meet on days and times of their own choosing, and can take part in a variety of agency-sponsored activities, including community service projects. School-based mentoring is one-on-one and occurs over the lunch period. More than half of the girls that BSAGB serves participate in one of these one-on-one programs. In addition, group-mentoring programs are designed to meet the developmental needs of middle-school girls, ages 12 to 15, with two programs, Life Choices and TEAM (Team Enhanced Approach to Mentoring). Both groups give Little Sisters the chance to meet weekly in schools, housing developments, and other community sites for 90-minute sessions facilitated by BSAGB social workers and — in the case of TEAM — with Big Sister volunteers, as well. In all, BSAGB has more than 1,400 Big Sisters and serves more than 2,100 girls in the Boston area.

**Size:** \$2.2 million in revenue; 42 employees (as of 2003).

**Revenue growth rate:** Compound annual growth rate (1999-2003): 13 percent; highest annual growth rate (1999-2003): 35 percent in 2001.

**Funding sources:** BSAGB has a diverse funding mix, including foundations, special events, United Way, individual donors, corporations, government, and other sources. Overall in 2003, BSAGB received 50 percent of its funding from foundations, 17 percent from special events, 14 percent from the United Way, 7 percent from individuals, 6 percent from corporations, 1 percent from government, and the remaining 5 percent from other sources, such as income from national and interest income.

**Organizational structure:** BSAGB is part of the national Big Brothers Big Sisters of America organization, which has more than 470 agencies nationwide. BSAGB is an independent 501(c)(3) and has four offices in and around Boston.

**Leadership:** Jerry Martinson, executive director.

**More information:** [www.bigsister.org](http://www.bigsister.org)

## Key Milestones

- 1952: Incorporated in Cambridge, Massachusetts
- 1984: Joined the national Big Brothers Big Sisters of America organization
- 1992: Co-founded the Girls' Coalition
- 1996: Set a goal of doubling the number of girls served between 1996 and 2000
- 2000: Began creating career ladders and promoting staff retention
- 2001: Established a strategic growth plan, which called for doubling the number of girls served again between 2001-2005
- 2002: Added a chief operating officer

## Growth Story

The Big Sister Association of Greater Boston (BSAGB) was founded in 1951 by three Cambridge residents: Reverend Harold Taylor, assistant rector at Christ Church in Cambridge; Edith Taylor, a Cambridge police officer; and Frances Marley, an administrative assistant and legal consultant for the Society of Prevention of Cruelty to Children. Believing that girls in their community could benefit from the guidance and support of an older female friend, they created a one-to-one mentoring program in which girls (Little Sisters) were individually matched with caring and committed volunteers (Big Sisters). In 1952, the program was incorporated as the Big Sister Association of Greater Boston.

In its first year, BSAGB matched six girls with supportive women volunteers; 52 years later, it is serving more than 2,100 girls annually. BSAGB is a member of the national Big Brothers Big Sisters organization, which has 470 agencies nationwide. The first Big Sisters program, called Catholic Big Sisters of New York, started in 1902 to befriend girls who came before the New York Children's Court. The Big Brothers and Big Sisters Federation was founded in 1917, after the movement had spread to 96 cities.

The primary motivation for BSAGB's growth over the years has been community need. In 1996, the organization set a goal of doubling the number of girls served in the Boston area, which it achieved in 2000. "Although we had doubled in size, we realized there were still so many more in need than the number we were serving," says Jerry Martinson, executive director. "The number of girls on our wait list is growing significantly. The number of volunteers is also growing, and we are not able to move them through the process quickly enough to meet the needs of the girls on our waiting list."

In 2001, the organization observed its 50th anniversary. The anniversary coincided with the implementation of a strategic growth plan for 2001-2005 that called for another doubling of the number of girls served. BSAGB aims to serve 3,000 girls by the end of 2005, up from 1,400 in 1999. Last year it had 1,360 volunteers who worked with girls, but that number will have to double to keep up with the planned growth. "In order to meet the growth goals that we've set in the Boston community,

we need to think about partnering with mentor-rich organizations such as colleges, corporations and churches that are sources of [mentors for girls] and that are interested in mentoring girls,” says Mia Roberts, chief operating officer.

Martinson says 60 percent of Little Sister referrals come from other agencies, rather than from the mothers of prospective Little Sisters. “How we operate in the community has always been with other organizations,” she says. “We had been working with the schools for 20 years so we already had some trust there. Because of this, we were able to do our school program easily.”

Beyond partnering for access to Big and Little Sisters, BSAGB also collaborates with peer organizations working toward similar goals. BSAGB works closely with the Girls’ Coalition of Greater Boston, a consortium of Boston-area organizations that Martinson helped establish. Girls Coalition supports girls’ programs, services, and research through education, advocacy, and networking. BSAGB also works with the Massachusetts Mentoring Partnership.

BSAGB has implemented several unique mentoring programs, including school-based mentoring, the TEAM program, and a workplace mentoring program. Expanding models of mentoring has been an important strategy for growth.

The organization uses the Balanced Scorecard to align its strategy with the outcomes data it collects on such programmatic metrics as the length of the waiting time to be matched for both volunteers and girls, length of match, rate of matches closing prematurely as well as measuring outcomes around fundraising, volunteer recruitment, community visibility and organizational effectiveness. “A big positive about [Balanced Scorecard] was that it was developed by everyone who was a manager here,” says Jessie Saacke, director of administration and finance. “It helped make all of them aware of what else is going on in the agency. There are a lot of ways we are interdependent on each other. It was a really interesting exercise to come up with measures for all of our strategic objectives.”

“The organization knows its success by looking at these metrics: program goals, fundraising goals, volunteer recruiting goals,” says Roberts. “The two big goals are how many girls do we want to serve and how much money do we need to raise. Business plans and individual goals are based on these two big goals. Quarterly

reviews are based on the Scorecard. The Scorecard links the annual business plan to the five-year strategic plan. If we want to be at a particular place in five years, there are certain fundamental strategies that have to be in place.”

“Measurement has been a change for social workers — to think about how many matches should we be making and how many inquiries should we be getting in order to make those matches,” Martinson adds. “It’s hard to change mindset, but it’s how we know when we’re achieving. If we didn’t have goals in the strategic plan, we wouldn’t be growing.”

## **CONFIGURATION**

BSAGB joined the national Big Brothers Big Sisters of America in 1984. BSAGB predated the national organization, which formed in 1977 when the national Big Brother and Big Sister Federations merged. The national Big Brothers Big Sisters of America has its own growth goals, aiming to serve more than 1 million Little Sisters and Brothers each year by 2010.

“We decided to join national because they were very aggressive and because it was our business,” says Martinson. “National is trying to grow, but they can’t grow without the [local] agencies. It has also given my staff and me a peer group to talk about how we are doing things and brainstorm innovations.”

BSAGB gains a great deal from the strong national brand. “If we called ourselves the Big Friends of Girls, we wouldn’t be as successful,” says Martinson. “[But] we have always been kind of an anomaly. For example, we choose to use social workers [with a Masters or Bachelors of Social Work]. The Big Brothers model was about fatherless boys. Big Sisters is not about motherless girls. We are a support to families. We serve two-parent and one-parent families. We choose to serve some of the most at-risk girls.”

National Big Brothers Big Sisters has provided some pass-through funding for specific initiatives. “Funding is coming from national, but that is also a stick because they can withhold those dollars for people who don’t follow their practices,” Martinson says.

There has been some pressure to merge with Big Brothers in Boston. “No matter how well we do, they will say, ‘If you could do that separately, think of what you could do together.’” But Martinson thinks the idea doesn’t fit her organization’s mission. “If you start with the premise that there is no gender in Big Brothers Big Sisters, we are in trouble. Our whole belief system says there are fundamental differences [between men’s and boys’] and women’s and girls’ needs.

Relationships are how women function and grow in this world, so there is so much we do to support this. If we merged [with Big Brothers], it would be bigger, but not necessarily better.”

National is working to standardize programs under a consistent brand. Local agencies largely started up on their own, and many are seen as too small to scale. “The likelihood of small organizations going to scale is very small because you don’t have the money, you don’t have the clout, and you can’t attract a good board,” says Martinson. She says the national plan is for a maximum of six agencies per state. With 15 agencies now in Massachusetts, some would not survive.

National is also trying to standardize how services are delivered. “Part of [national’s plan] is a strategy for growth, but it skips some steps that we don’t want to skip because we think it is one of the secrets to our success,” says Martinson. “The one-size-fits-all emphasis would require us to make some compromises we feel are not as effective in a gender-specific program such as Big Sister. For example, we feel that pre-match training is critical to the success of our program, contributing to the longevity of matches and low closure rate. The new National service delivery model provides individual post-match training as needed. So they are standardizing in a way that might not be the most effective for us and that would require us to make compromises that we are not willing to make.”

Martinson struggles to maintain her program’s integrity every day. “It consumes an incredible amount of energy for me and my staff trying to figure out how to support but not compromise who we are, what we are, and why we are successful,” she says. “It’s great that national is creating a brand, but there has to be flexibility to reflect market differences.”

## **CAPITAL**

Foundation supporters have been especially important to BSAGB. It has relied on foundations like the Edna McConnell Clark Foundation and the Boston Foundation, as well as the United Way of Massachusetts Bay. The Clark Foundation's grant of \$2 million over several years has been the most significant grant in Big Sister's history.

BSAGB's fundraising capacity was strengthened after the creation of the Girls' Coalition in 1992. The Coalition helped increase funder awareness of girls issues with the release of an influential study called "Worlds Apart," commissioned by Women in Philanthropy. The study found that less than 5 percent of foundation support goes to women's and girls' programs.

The United Way used the study to raise more money from women who care about girls issues. Since BSAGB is one of the few large organizations in Boston that is female-specific, they were able to receive a large amount of support from United Way's "Today's Girls Tomorrow's Leaders" campaign.

"We have a unique United Way in that it is one of the few who figured out that women would give for things they care about, [and that women's giving was] not about prestige," says Martinson. "And women care about girls. [The United Way] raised the profile of girls in the city and also raised the level of philanthropy among women to support girls. Boston has a rising community of women who understand the need to do more for girls in the community."

Individual donors have been another important source of funding, giving in particular through BSAGB's recent capital campaign. The Growth Fund for Girls' Dreams is a \$10 million campaign with a dual focus: a \$3 million strategic growth fund to underwrite the incremental costs of implementing the organization's five-year strategic growth plan, and a \$7 million endowment fund to provide a portion of the association's annual operating income in the future. By 2004, the organization had received \$4.5 million for this fund.

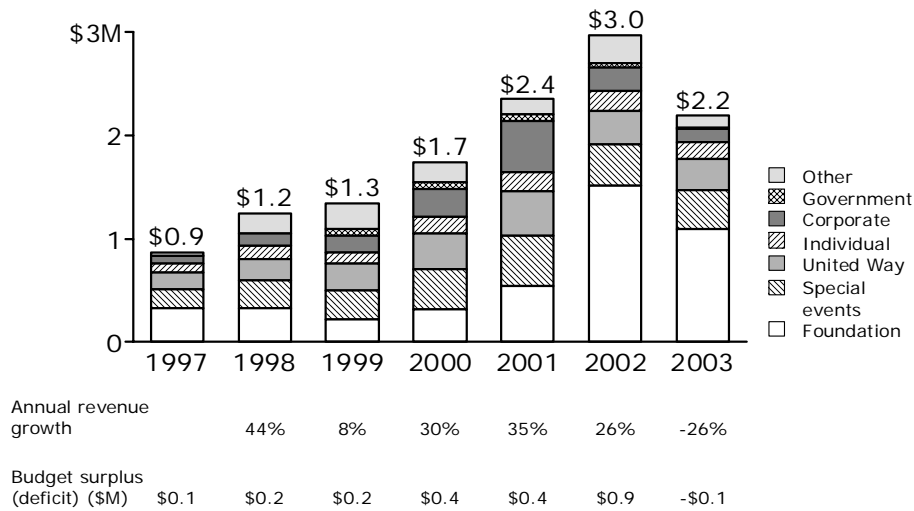
Special events bring in almost \$400,000 each year, and include an annual gala and a BMW car raffle. BSAGB also has found corporate foundations to be an



effective source of funding. The BSAGB board has representatives from prominent companies in Boston, such as Blue Cross Blue Shield and Citizens Bank, and actively seeks out representation from important industries to the region, such as biotech. The association is able to create partnerships with corporations, soliciting not only money, but also volunteer hours. Federal funds and state funds, received indirectly from organizations such as the Boston Compassion Fund and the Massachusetts Service Alliance, round out the mix. (See Figure 1.)

Figure 1

Big Sister Association of Greater Boston revenue



Source: Organization internal data

2002 was a banner fundraising year for BSAGB. A large foundation grant pushed the organization’s total revenues toward the \$3 million mark, allowing the board to put aside \$750,000 as a financial reserve. Revenues settled back to the \$2.2 million level in 2003.

“We have a very good cross-section of funding sources — a nice, diversified portfolio,” says Martha Lemons, director of development. “We know that we are lean and mean and working hard to achieve our mission.” She says it’s important to funders that 88 percent of money raised goes directly into serving girls. But she thinks giving from individual donors is the biggest growth opportunity for the

organization. She'd like to see individual giving rise to 30 percent of funding in the next five years, up from its current 7 percent.

"Now we have the staff that are capable of growth, but we need to focus on the board," says Martinson. "We need a board that is capable of growth, especially around funding." Board members are being asked to double their personal commitments, for instance.

### **CAPABILITIES**

"My mindset used to be 'sheer will,'" says Martinson. "We will serve more girls, and we will raise more money." Martinson has realized that "sheer will" will not be sufficient to support her organization's growth.

BSAGB's staff size increased by 50 percent between 1999 and 2003. Based on recommendations from a team of MBA candidates from Bentley College in 2000, BSAGB began to restructure positions to create career ladders and to promote staff retention. The retention efforts appear to be paying off; staff tenure over this period grew from 2.5 years in 1999 to 2.9 years in 2003, and four staff members had been with the association for five years or more in 2002.

Also in 2000, BSAGB gradually began adding staff positions in programs and development. "One of the real keys is having the right people and the right human resources," says Martinson. "It is having the right people in the place. And it's also knowing how to figure out when you have the wrong person."

In 2000, the United Way of Massachusetts Bay provided technology support and training to evaluate program outcomes, which BSAGB staff took advantage of to enhance the program outcome efforts that were already underway. In 2002, BSAGB added a chief operating officer position and more staff in programs, accounting, and development. The organization also began to develop the management capabilities of the program staff in charge of each program, moving these positions from more of a coordinator level to a management level. The organizational structure evolved along with the growth. By 2003, the staff had grown into seven teams: management; administration and finance; recruitment and

program support; development; community-based mentoring; group mentoring; and school-based mentoring.

“When we were smaller, modest incremental growth was achievable,” says Martinson. “But then you reach a point where it is clear that you need a plan for growth and what it would take to achieve it. For example, we needed to increase our bench strength. We re-looked at all of the jobs — how could we retain staff, how could we create layers and levels for people to grow into these roles, how do we develop people, and so on. Institutional investment for infrastructure was critical. We developed a more realistic salary schedule to attract top talent.”

The board specifically insisted that Martinson hire a chief operating officer to deal with the rapid growth. “If you’re hiring someone for a position you don’t have, it’s hard to know what you need,” says Martinson. “It’s difficult to let jobs go and let someone do it differently.”

The addition of a COO in 2002 allowed Martinson to spend more time on fundraising and strategy development. Mia Roberts came on to run programs, finance and administration, and human resources — all the “internal operations.”

“There are a set of relationships that pre-existed my becoming COO,” says Roberts. “I could not abruptly change these relationships. So I could not just tell everyone to stop going to Jerry [Martinson’s] office. My perspective is that you have to earn people’s respect. That requires an agreement on the part of both Jerry and me. We agreed that I would not interrupt that relationship in a hierarchical way. We identified what the behavioral indicators would be. If people stopped going to her door, we would know that our job was done.”

Things have changed for Martinson since Roberts came to the organization. “I am definitely spending my time differently,” she says. “It’s still hard for me to clean everything off my plate, but people are doing a better job of communicating with me. For example, I don’t spend as much time on fundraising events, day-to-day program decisions, and so on. I’m still trying to figure out what I should do. It’s hard to feel as useful when I do not have a checklist.” As for the board, Martinson plans to focus this year on improving board governance and focusing the board on fundraising and strategic planning.

The pace of change and additional levels of hierarchy have created new stresses on the organization's ability to make decisions efficiently. "We now start with a small core group to define questions and efficiently make decisions," says Roberts. "There is a step-by-step process to identify: a) the changes necessary; b) what's working; c) what's not working; and d) potential solutions. If the solutions we find within our framework don't solve the problem, then we're going to look at major change. And that's where we are now. The process of moving some decision-making authority to the program managers continues to evolve. We are filling in places that we don't have answers."

Roberts has invested a great deal of time in training managers to improve their skills and manage staff better. For instance, managers are now expected to develop budgets and business plans for their departments to give them a sense of responsibility for the organization's financial success. Roles and responsibilities also needed to be clarified. "Often in nonprofits, you are hired under one description and people think you are good at something else, so you end up doing something else," says Roberts. "When I started to interview people and compare their job title versus what they did, and their answers were fuzzy, then I knew there was work to be done, especially when I connected that to the productivity of their department."

Roberts' advice for anyone attempting to create change throughout an organization? "If you want to make an impact, first face the most felt problems, which are the people," she says. "And then look into the system problems, because those end up being people problems most of the time, as well. The common thread for success among all types of nonprofits is goal clarity and efficient responsiveness to feedback. If you ever lose site of either of these things, then it will cost the organization. That is the biggest struggle in the change process."

## Key insights

- **Monitoring to ensure quality growth.** Growing with quality took hard work and constant monitoring. The agency tracks its efforts diligently to demonstrate quality to both internal and external audiences.
- **Creating change.** Change wasn't just about hiring a chief operating officer, streamlining operations, and adding layers of management. The right decision-making processes and structures had to be put in place. Managers were trained to equip them with the right skills, people issues were resolved, and roles and responsibilities were clarified.
- **Partnering well.** BSAGB has worked to create and work with area organizations, such as the Girls' Coalition, to enlarge the fundraising pie for everyone.
- **Transitioning to individual funding.** The organization was able to get large grants from a few of its foundation funders. However, these revenue streams will eventually disappear. The association is now trying to develop methods of growing its revenue, specifically around individual funders and has hired staff with expertise in this area. The agency is working closely with its board in these efforts.
- **Managing a national affiliation.** Even though BSAGB has been successful in its own right, it still sees the value of being part of a national network with a strong brand. This relationship requires work, as the goals of the two organizations are not always aligned.