



BOY SCOUTS OF AMERICA®
OCCONEECHEE COUNCIL

OCCONEECHEE
STRATEGIC PLAN

2021 - 2026

MISSION STATEMENT

It is the mission of Scouting BSA to serve others by helping to instill values in young people and to prepare them to make ethical choices over their lifetime in achieving their full potential. The values we strive to instill are based on those found in the Scout Oath and Law.

The Occoneechee Council carries out this mission of Scouting BSA in every community within the twelve counties of our Council. We are North Carolina's premier youth organization serving all young people with exciting, dynamic programs based on leadership development, community service and character enhancement including a focus on outdoor experiences and high adventure. These programs are provided under the supervision of trained and skilled adult leaders while we prepare them for a lifetime of contribution, leadership and success in our society.

VISION STATEMENT

It is the vision of the Occoneechee Council, Boy Scouts of America to be recognized as a leading advocate for all youth in our Council's communities, to be strong and financially secure, to reflect our region in the communities we serve as we develop youth members to be responsible, ethical citizens instilled with the values of the Scout Oath, Scout Law, and Motto. Further, we seek to double the size of our membership and our Council's budget over the next four years.

GUIDING PRINCIPLES

Our Guiding Principles are encompassed in the Scout Oath and Scout 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 and Reverent.*

COMPETITIVE ADVANTAGES

Occoneechee Council offers an exciting program centered upon outdoor experiences, including participation in high adventure camps, under the leadership of trained and skilled adult leaders. Through these experiences Scouts:

- Develop as responsible, ethical young people
- Are instilled with the values expressed in the Scout Oath, Law and Motto
- Are trained in citizenship, service and leadership
- Serve the communities in which they live
- Prepare themselves for a lifetime of contribution and leadership in our society

STRATEGIC ISSUES

- Membership
- Marketing/Communications
- Unit Service
- Program
- Facilities
- Leadership & Governance
- Finance

CUSTOMER SEGMENTS

Units	These are our sponsoring partners. They need adequate and frequent support from the Districts and Council in the form of training, program and properties to assist them in delivering the promise of Scouting.
District Leadership	These individuals provide real support to our units and sponsoring organizations in the way of training, programs, instruction and program tools. They need to feel and receive positive reinforcement and resources from the Council.
Registered Youth	Scouts are eager to learn, full of enthusiasm and have a strong desire for adventure. Scouts want to learn to be tomorrow's leaders. They need the opportunity to participate in the full Scouting Program. They deserve exemplary and fully trained leaders. They need advancement opportunities and quality outdoor venues.
Charter Organizations	These are the organizations that sponsor scout units whose objectives, mission, and methodologies are compatible with those of Scouting. They need program support, training, program tools, and information to assist them in running a successful scout program.

STRATEGIC PLAN

Leadership & Governance Section

VISION STATEMENT

Occoneetchee Council is governed by diverse, high-performing, mission-driven leaders who ensure the strategic acumen, community engagement, fiduciary oversight, enterprise risk management, and effective governance needed are in place to deliver a high-impact, inclusive, and world-class Scouting experience to the youth of our community.

LEADERSHIP AND GOVERNANCE STRATEGIC OBJECTIVES & COUNCIL GOALS

A. Board Leadership, Governance, and Performance

The Council Executive Board and its committees draw on the skills, talents, and perspectives of a broad and diverse range of leaders who are representative of the community we serve and who have the passion and ability to drive our Scouting program to new and exciting levels of success.

- Committed volunteer leadership representing all geographic areas of our council is actively involved in identifying, recruiting, and on-boarding new volunteers to the board and its committees.
 1. *A board development committee is established to manage board nominations and to support the board in its efforts to assess and enhance its policies, participation, performance, and future viability. This committee will consist of members from each district and other board representatives and members of the council.*
 2. *The board development committee meets at least quarterly to identify needs for and candidates for board membership.*
- Orientation, ongoing learning, mentoring, and support ensure board and committee members deepen their understanding of their roles, responsibilities, and legal obligations and are prepared, engaged, and invested, taking responsibility for the council's mission and the performance of the board and its committees.
 1. *A special board orientation course is required for all current members of the board who have not been to the council board orientation course.*
 2. *All new members of the board participate in a mandatory council-tailored board orientation course within the first three months of their taking office.*
 3. *All new members of the board are assigned a mentor to help each new member understand his/her role on the board and to aid the member in executing their given role.*

- Drawing on best practices in nonprofit board development and governance, the board regularly assesses its responsibilities, structure, size, composition, culture, and operations, and takes action to enhance the policies, participation, performance, and future viability of the board and its committees.
 1. *The board development committee reviews current council bylaws, guidance from Scouting BSA, and best practices in nonprofit governance to recommend revisions and amendments that increase the effectiveness of board leadership and governance.*
 2. *The board establishes policies on term limits and related expectations for each position on the board and its committees.*
 3. *The board establishes a policy concerning its composition, with a view to streamlining its membership to facilitate more effective operations.*
 4. *Each standing committee of the board develops a charter defining its purpose, responsibilities, structure, composition, and term expectations.*

- The board and its committees are results-oriented, regularly measuring the council's progress towards its mission, vision, and goals, and evaluating the quality, efficiency, effectiveness, and impact of major programs and services.
 1. *The board reviews the council's progress in implementing the strategic plan at least twice per year.*
 2. *The board reviews the strategic plan every two years and modifies the plan as needed for effective operation.*
 3. *The board reviews the council's progress on the Journey to Excellence (or successor metrics) at each board meeting and progressively adjusts its program to assure best results.*

- Guided by the Scout Oath and Law, the board and its committees promote a commitment to ethics, integrity, transparency in their operations, ensuring congruence between its decisions and actions, and the core values of Scouting.
 1. *The board establishes and ensures that each board member understands and signs an annual agreement outlining the roles, responsibilities, and expectations of board members.*
 2. *The board development committee reviews and ensures that each Board member has signed and understands the council's conflict of interest policy each year.*
 3. *The board establishes and implements a whistleblower policy that encourages staff and volunteers to come forward with credible information on illegal practices or violations of adopted policies of the council, specifies that the council will protect the individual from retaliation, and identifies those staff, board members, or outside parties to whom such information can be reported.*
 4. *The board establishes and implements a document retention and destruction policy.*

B. Diversity, Equity & Inclusion

The Occoneechee Council promotes a culture in which each youth, volunteer, and employee feels that they belong, are respected, and are valued in Scouting and in our community.

- Increase and accelerate the diversification of our board, council and district committees, and other volunteer and professional leadership to reflect the demographics of the areas we serve.
 1. *Establish an Equity Committee at the council and district level to support the board and district committees in increasing the diversity of Scouting stakeholders, creating a culture that welcomes and respects diverse perspectives, and ensuring related policies and goals are tracked and reported.*

- Review every element of our programs to ensure diversity and inclusion are engrained at every level for participants, volunteers, and employees by applying a standard that promotes racial equity and denounces racism, discrimination, inequity, and injustice.
 1. *The Council Key 3 as well as the leads of customer facing roles take racial equity training to apply lessons to organizational policy and training.*
 2. *Promote racial equity training for all staff, volunteers, and youth participants.*
 3. *Encourage activities that expose youth to multi-cultural experiences throughout the Scouting program including keeping a running list of resources for these experiences at the district and/or council level.*
- Meet with civic and community leaders and other stakeholders to position Scouting's availability to all youth, including traditionally underserved communities and their diverse populations.
 1. *Key leaders of the council and each district visit predominately Black/African-American, Hispanic/Latinx, Asian, and other underrepresented units to listen and learn about volunteer and family experiences as well as gain insight for how to best support them.*
 2. *Review and prioritize insights learned from their listening tour to implement solutions that best serve these units.*
 3. *Invite Black/African-American, Hispanic/Latinx, Asian, Indigenous, and other underrepresented civic and community leaders and organizations to meet with the council to discuss ways to partner in service to all units, especially those in underserved communities.*
- Commit resources to create a more diverse and integrated Scouting program in our council.
 1. *Dedicate a portion of the budget to increasing diversity and equity in the program.*
 2. *Create opportunities for units to learn from and support each other in ways that advance communication, collaboration, and understanding, leading to a more inclusive and high-impact Scouting experience for all participants.*

C. District Leadership & Operations

District committees are composed of strong, diverse teams of leaders with the knowledge, abilities, and support to enable the districts to operate successfully.

- District committees and commissioner staffs are fully staffed and operating effectively.
 1. *District nominating committees are active year-round, identifying, recruiting, and on-boarding a diverse set of volunteers to district committees, subcommittees, and other leadership roles, reflecting the demographics of the areas we serve.*
 2. *Training is organized to provide the district nominating committees and key district committee leaders the knowledge to fully staff each district committee and commissioner staff.*
 3. *District and council leadership meet semi-annually to review the progress towards fully-staffed teams and will recommend additional steps as needed.*
- Districts are forward-looking, strong, and fully functioning.
 1. *A working group of District Chairs and Commissioners identifies and resolves common issues, assesses district development and resource needs, and identifies council support needed to make the districts successful. This group meets quarterly and is chaired by a new board position to coordinate district leadership and operations.*
- A culture of teamwork and cooperation exists between the districts and the council.

1. *Council program committees support their district counterparts by coordinating council and district activities, programming, and calendars.*
2. *Council program committees promote and coordinate programming between and among districts to avoid schedule conflicts and maximize efforts without duplicating work.*
3. *Council committees ensure that districts have similar access to council facilities and resources as all other council-level programming.*

D. Enterprise Risk Management

Occoneechee Council provides a safe Scouting experience for youth and adults while maintaining an exciting and challenging program.

- The council maintains an active Enterprise Risk Management (ERM) Committee, including and training ERM Committee representatives from each district to oversee awareness of and mitigation of risk in the entire council.
- The council maintains and periodically reviews a council-tailored ERM District & Unit Guide.
 1. *The ERM District & Unit Guide is written as a resource updated periodically to aid the districts and their units concerning safe operations and programming.*
 2. *The ERM District & Unit Guide emphasizes incident reporting and outlines procedures for reporting, with the intent of increasing use of trip and event planning and incident reports for a broader understanding of risk involved in various activities.*
- The council maintains an active Youth Protection Training (YPT) Committee as part of the ERM Committee.
 1. *The YPT Committee includes trained Youth Protection Champions from every district and meets quarterly to review best practices.*
 2. *The YPT Committee encourages and provides group Youth Protection Training within districts and units on a regular basis.*
 3. *The council establishes a policy requiring all adult leaders to be current with their YPT for their entire charter or registration year.*
- The council maintains an active health and safety committee as part of the ERM Committee, including representatives from every district.
 1. *The health and safety committee provides periodic health and safety training through the district Roundtables and basic training courses for leaders.*
 2. *The health and safety committee ensures through adult leader education that incident reports are understood and filed with the council. The committee will also ensure that incident reports are sent to the Safe Scouting Support Committee for review.*

Marketing and Communication

VISION STATEMENT

Occonechee Council will improve the awareness and perception of Scouting within the communities we serve and make measured improvements in the quality of internal communications, enhancing the engagement and experience of our Scouting stakeholders in order to serve more young people through a stronger Scouting program.

MARKETING AND COMMUNICATION STRATEGIC OBJECTIVES & COUNCIL GOALS

A. External Marketing and Communication

We will show our community what the BSA is: the premier youth development organization available to their children, by connecting with families where they are – online and through personal relationships. We will improve the perception of the BSA in the community through improved message quality, frequency, and targeting at every level of the organization.

- Improve the quality and effectiveness of external communications at the council, district, unit and stakeholder level.
 1. Develop an annual communication plan for the council which includes unified branding, key messages for the year, and resources for council departments, districts, units, and families that include templates and other stock content.
 2. Develop marketing and communication standard operating procedures for common use scenarios including annual campaigns, program events, crisis communication, organization highlights, etc. Implement, evaluate, and improve procedures annually.
 3. Establish a plan to support new leaders and volunteers with marketing and communication collateral, plans and processes.
 4. Add a dedicated Director of Marketing and Communication to the council staff who brings subject matter expertise to our professional team and whose sole role is to make measured improvements both internally and externally.
 5. Further segment and delineate official platforms for communication from unofficial scouting community forums, creating clarity and a unified voice.
 6. Develop a social media team for the council with both staff and volunteers to execute on the council marketing and communication plan. Emphasis should be placed on fostering content creation at the family/unit level that can be deployed at a broader level and within their own networks.
 7. The council will evaluate and refresh public facing communication properties (website, social media, email templates) at least every three years to ensure relevance, effectiveness, and accuracy of content.

B. Internal Marketing and Communication

The Occonechee Council will develop processes, resources, and practices to better inform, engage, and support Scouting stakeholders as they carry out the Scouting program for more young people.

- Every council and district event and campaign will have a documented marketing and communication plan that includes:
 1. A method for generating, acknowledging, and responding to feedback before, during, and after the campaign.
 2. A narrowly defined audience of likely or prospective stakeholders.
 3. A prescribed set of communication channels tailored to reach the selected audience for each variety of message to be sent.
 4. A set timeline for each message to be distributed before, during, and after the event.
 5. A clearly defined two-deep/redundant point of contact that creates accountability and expedites response, wherein messages go to several points rather than a single point of contact. (Example: Support@ocscouts.org, SummerCamp@ocscouts.org, membership@ocscouts.org)

- The council will own the infrastructure for council and district marketing and communication.
 1. The council will maintain and update databases of contact information that are current, accurate, and available for council and district use through prescribed channels.
 2. The council will make available uniform platforms for marketing and communication, including digital properties where information can be pulled and communication channels where information can be pushed to audiences.
 3. The council will create and maintain community platforms for targeted stakeholders within the council, fostering collaboration, resource sharing, and best practices.

- The council will evaluate and improve on marketing and communication plans annually as part of their planning cycle.
 1. Marketing and communication plans should be archived for evaluation as part of the documentation process.
 2. Vice Presidents and Staff Leaders are responsible for onboarding and engaging new leadership regarding marketing and communication planning.

Program and Facility

VISION STATEMENT

Provide Council programs that provide unique outdoor opportunities that support the development of the scout and scout leader, and focus on building stronger unit-level programs. Programs will be fun and challenging and provide experiences that instill values, self-reliance and self-confidence. Council facilities should be maintained to the safest and cleanest level possible. Quality facilities play a vital role in the overall experience and looking forward should consider whole family use of facilities.

PROGRAM AND FACILITY STRATEGIC OBJECTIVES & COUNCIL GOALS

A. Program/Personnel Development

- Occoneechee Council provides a high-quality program through its network of volunteers and should grow with its strongest resource: its people.
 1. *The Occoneechee Council and Research Triangle region of NC continues to attract talent from all over the world. The council should be continuously working to identify, recruit and retain program-oriented personnel.*
 2. *Operating committees will be challenged to expand to a level that facilitates a smooth operation and execution of Council level programs.*

B. National Camp Accreditation Program (NCAP)

- The Occoneechee Council will expand on its commitment to the NCAP Standards. Having been a Beta Council for the NCAP, the Occoneechee Council has a deep and strong history with this program.
 1. *The Occoneechee Council will continue to utilize the NCAP Standards to maintain the highest quality programs for both Council and District led events.*
 2. *Recruit and train sufficient numbers of short-term Camp Administrators to ensure compliance with standards for these programs.*
 3. *Maintaining a Nationally Accredited Scouting BSA Summer Camp while expanding exciting program opportunities.*

C. Properties Assessment and Maintenance

- The Council Board of Directors has provided us with high quality facilities that take vigilance to oversee the vast scope of day to day operations and maintenance.
 1. *Continue to recruit and empower volunteers on the Properties Committee that have expertise, skills, training and a selfless desire to make what we have the best it can possibly be.*
 2. *Develop a plan to have a second camp Ranger by 2022.*
 3. *Utilize maintenance software to increase preventative maintenance and minimize deferred maintenance.*
 4. *Work with Council Board and Development department to require that all future capital projects for the Occoneechee Council have maintenance dollars included in the endowment.*

Finance

VISION STATEMENT

Generate sufficient revenue and control expenses in a manner that allows Occoneechee Council to fulfill its mission.

FINANCE STRATEGIC OBJECTIVES & COUNCIL GOALS

- A. *Have a Council Service Center that supports our strategic program goals aligned with our membership and staffing requirements.***

- B. *Develop an annual financial development plan that targets: Scouting families, alumni, local businesses, etc. in support of Occoneechee Council.***

- C. *Retire all existing long-term and short-term debt.***

- D. *Setup a working capital balance equal to 3 months of operating expenses.***

- E. *Grow the Council's endowment fund to \$8M in 5 years with the intent to support the operating budget annually.***

- F. *Explore available funding options to settle legal claims.***

- G. *Develop a plan to encourage units to participate in Council fundraising activities (e.g. popcorn, camp cards).***

- H. *Enhance our financial reporting and communication of results to our volunteers.***

- I. *Integrate annual financial budget with membership budget.***

Membership and Service

To double the youth membership of Occoneechee Council by 2025, by recruiting and retaining adult and youth membership in a way that reflects the demographic of our council's geographic territory

Need to add vision for Service

MEMBERSHIP STRATEGIC OBJECTIVES & COUNCIL GOALS

- A. Recruit so that our adult and youth membership reflects the demographic of our council's geographic territory.**
- Complete staffing of volunteers to fill Town/City membership coordinators, with emphasis on achieving a diverse representation of males and females
 - Refresh and expand all recruiting materials to make them more inclusive to all the major demographics in our Council territory (Membership)
 - Using the Council Market Analysis provided by National BSA, identify geographic areas within our Council that meet Total Available Youth (TAY) guideline and where insufficient number of existing units are identified. Goal is to kick-off the new unit campaign in those specific areas beginning in Q2 2021 (Membership & Marketing)
 - Increase female membership by 5% each year (Membership)
- B. Implement new ways to recruit today's youth into Scouting**
- Identify Council units that have outperformed the Council average in Unit membership recruiting and growth to examine methods used and compile best practices. (Membership Marketing)
 - In conjunction with Unit Commissioners, start sharing best practices identified at Roundtables and through district Membership committees.
 - Examine ten councils of similar size or demographics to review other councils' successes and failures in their membership efforts to learn lessons on how to utilize what others have learned without our expense.
 - Develop and adopt a standing Peer to Peer recruiting program with strong incentives and recognition for youth who recruit new youth. (Membership & Finance)

SERVICE

VISION STATEMENT

To create a dynamic, robust and trained Unit Service team to assess, record and respond to unit needs, linking them to higher level organization's resources.

UNIT SERVICE STRATEGIC OBJECTIVES AND COUNCIL GOALS

- A. Increase the number of actively serving Unit Commissioners by actively recruiting from outgoing Key 3 unit leadership (Cubmaster, Scoutmaster, Committee Chair, Advisor, etc..) as well as using the 5 year roster mining approach.**
- Ensure that every unit has an assigned Commissioner responsible for meeting unit needs.
 - Increase the number of serving Unit Commissioners to ensure that the recommended three assigned units per Commissioner is met.
 - Increase the diversity of the Occoneechee Commissioner service to reflect the current ethnic and gender makeup of Occoneechee Council.
 - Create a Commissioner specific nominating committee for each district and/or service area.
- B. Increase training opportunities of new and actively serving Commissioners**
- Have all Commissioners trained in position within 90 days of assuming Commissioner role.
 - Establish an Assistant District Commissioner for Training position to track and monitor District Commissioner Training status.
 - Have all Commissioners achieve at least a Bachelor of Commissioner Science (BCS) degree within 18 months of beginning Commissioner service.
 - Provide at least three opportunities for physical, hybrid or virtual Commissioner College each year by networking with other Councils and increasing awareness of those opportunities.
 - Provide an alternate to in-person Commissioner College within the Council using either a hybrid or virtual experience and make that opportunity available to other Councils.
- C. Determine critical unit needs and proactively link them to the appropriate resources at higher levels**
- Increase unit awareness of Commissioner functions.
 - Conduct an initial Detailed Assessment for each unit within the first two month (60 days) of each calendar year during the re-Charter period, with the creation of 1-2 measurable and achievable short-term Unit Service Plans.
 - Conduct a Detailed Assessment of all newly formed units and units with a change in Key 3 leadership within the Council within six months (180 days) of their first meeting.
 - Increase the percentage of the Council units with a minimum of one detailed assessment and six simple assessments during the calendar year.
 - Increase Commissioner awareness and use of technology (ZOOM, Ring Central, etc.) to meet with units virtually and record contacts on Commissioner Tools.
- D. Enhance the effectiveness of Roundtables using technology**
- Develop a quarterly virtual Council Roundtable with breakout sessions for individual Districts or service areas.