

2020 SCORE SC Lowcountry Chapter Tactical Plan

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SCORE SC Lowcountry Chapter (SSCLC)

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1. Client Engagement

Strengthen Client Engagement

1.1. Experience

Maintain and improve the Client experience

Performance Indicators

1.1.1 Client Engagement

Description	Type	Start Date	End Date	NPS Rating
Achieve the highest quality review results on a per Client engagement basis, eg. Lean Canvas as appropriate, SCORE and local resources. Target = NPS Rating 90+	Target	2020-01-01	2020-09-30	90
	Actual	2020-01-01	2020-09-30	
Baseline = NPS Rating 93	Actual	2019-01-01	2019-12-31	93

NPS: 97+ (3/9) 2019 CEI

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1.1.2 Client Assignment Delays

Description	Type	Start Date	End Date	Number
Improve Client assignment board clearing within 72 Hours from request, timely mentor request to take client (exception process). Target = Zero greater than 5 business days	Target	2020-01-01	2020-03-31	0
	Actual	2019-01-01	2019-12-31	
	Actual	2020-01-01	2020-03-31	

Triage team approach - 1 on board (since 3/2)

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1.1.3 Not Yet Counseled

Description	Type	Start Date	End Date	Days
Improve Client Not Yet Counseled Performance to 100% within 21 days recorded in CORE — schedule initial client meeting within 14 days wherever practical, record session within 24 hrs of mtng or record close out w/in 14 days if no response from client. Target = <10% more than 21 days moving to 0 > 30 days	Target	2020-01-01	2020-03-31	21
	Actual	2019-01-01	2019-03-31	
	Actual	2020-01-01	2020-03-31	

8 >14 days (3/9), client conversion 80.7%

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1.1.4 Follow-On Rate

Description	Type	Start Date	End Date	Percentage
Maintain a high mentoring follow on rate, schedule next mtng Target = at least 60%	Target			60
	Actual	2019-01-01	2019-12-31	64.5
	Actual	2020-01-01	2020-01-31	64.5

69% follow on sessions (of total) - YTD vs. 2019: new sessions +.13.9%, follow on sessions: +38.5%, total sessions +29.9%

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2. Volunteer Engagement

Increase Volunteer Engagement

2.1. Growth & Retention

Continue effective growth and retention of the number of local Chapter Mentors

Stakeholder(s):

Mentors

Performance Indicators

Description	Type	Start Date	End Date
Increase number of Active, Involved Mentors (targeted expertise, needed roles) through retention and recruitment, compared to 2019. Target = 46 Active Mentors	Target	2020-01-01	2020-09-30
	Actual	2020-01-01	2020-09-30
Baseline = 41 Active Mentors	Actual	2019-01-01	2019-12-31

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2.2. Means

Enhance means of involving more Mentors in the core operation of the Chapter

Performance Indicators

2.2.1 Recognition

Description	Type	Diversity	Start Date	End Date
Consistent recognition (eg. quarterly, annual) of mentors' involvement in any of our multiple LC Chapter activities. Target = diversify recognition to include other activities of the Chapter	Target	Diversify	2020-01-01	2020-09-30
	Actual		2020-01-01	2020-09-30
Baseline = Recognition based heavily on Client feedback	Actual	Client Feedback	2019-01-01	2019-12-31

2/10 Awards event — mentor recognition

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2.2.2 Meetings

Description	Type	Start Date	End Date	Number
Development of innovative means of participation in monthly membership activity such as location, web video/Zoom, conference calls, and time. Target = 25+/- meeting — multiple venues, times	Target	2020-01-01	2020-09-30	25
	Actual	2019-01-01	2019-12-31	20
	Actual	2020-01-01	2020-09-30	20

meeting attendance up vs. 2019, April meeting PElectric, call in # not utilized

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2.3. Recruitment

Diversity Recruitment

Performance Indicators

2.3.1 Female

Description	Type	Start Date	End Date	Percentage
Recruitment of new Mentors to include female and minority representation. Gender 30.0%	Target	2020-01-01	2020-03-31	30
	Actual	2020-01-01	2020-03-31	
Baseline = Gender 29%	Actual	2019-01-01	2019-12-31	29

Marleen Cain 2nd interview stage

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2.3.2 Minority

Description	Type	Start Date	End Date	Percentage
Recruitment of new Mentors to include female and minority representation. Target = Minority: 8%	Target	2020-01-01	2020-09-30	8
	Actual	2019-01-01	2019-12-31	4.5
	Actual	2020-01-01	2020-09-30	4.5

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2.4. VE Survey

Analyze and act on VE Survey Results.

Performance Indicators

2.4.1 Feedback

Description	Type	Status	Start Date	End Date
Analysis and action on subjects/items of highest importance based on priority, eg. Seek input from all mentors, utilize individual mentors' skills & interests. Target: Implement 1:1 mentor feedback to better align interests	Target	Implement	2019-01-01	2019-12-31
Solicit mentors to provide input to questions of interest to them.	Target	Input	2019-01-01	2019-12-30
	Actual			

follow up with low activity mentors —(M. Bugher removed from roster per response) 2020 VE 3/10 start

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2.5. Succession Planning

Conduct succession planning.

Performance Indicators

2.5.1 Succession Plan

Description	Type	Status	Start Date	End Date
Review and evaluate positions/mentors for leadership roles during FY 2020 (SE Pilot). Target = Defined succession planning	Target	Defined	2020-01-01	2020-03-31
	Actual	Lacking	2019-01-01	2019-12-31
	Actual		2020-01-01	2020-03-31

Succession plan update — small market pilot

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3.1. Community Engagement

Improve Community Engagement

3.1. THRIVE Conference

Grow the THRIVE Womens Leadership Conference 2019/BizPitch

Performance Indicators

3.1.1 Paid Participants

Description	Type	Start Date	End Date	Number
Increase number of paid participants and quality of THRIVE 2019 Conference (sponsor/partnerships, attendee feedback) Target = BE, 200+ (150+ paid)	Target	2020-01-01	2020-09-30	200
	Actual	2019-01-01	2019-12-31	175
	Actual	2020-01-01	2020-09-30	175

Venues secured for BP and Thrive 9/22, 9/23

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3.2. Media Presence

Continue to Improve Media Presence of Chapter.

Performance Indicators

3.2.1 Media Presence

Description	Type	Status	Start Date	End Date
Enhanced interaction and presence participation/support in local print, radio and TV media; increase interaction with social media; Instagram, Facebook, etc. Target = Significant presence in multiple channels, metric tbd	Target	Significant	2020-01-01	2020-03-31
	Actual	Unfocused	2019-01-01	2019-12-31
	Actual		2020-01-01	2020-03-31

WSAV coverage of 2/10 awards event, Social Media plan developed, Volunteer ad to be placed

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3.3. Alliances & Partnerships

Continue to grow work with local community allied organizations, and local Chapter Sponsorships/Partners,

Performance Indicators

3.3.1 Activity Value

Description	Type	Start Date	End Date	Thousand Dollars
Maintain relationships with local allied organizations, and increase in number and value of local Chapter Sponsorships/Partner Activity. Target = Achieve 10+% growth over \$4K budget	Target	2020-01-01	2020-03-31	4.4
	Actual	2019-01-01	2019-12-31	5
	Actual	2020-01-01	2020-03-31	5

Grant applications: Wells Fargo, BofA, Truist - online Grant writer volunteer ad.....Facilitated Leadership retreat. with HH F/R (overall positive feedback)

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3.4A. Workshops

Continue growth of local education workshops.

Performance Indicators

3.4A.1 Workshops

Description	Type	Start Date	End Date	Number
Expand consistent, comprehensive, well-marketed quality workshops including increased mentor participation, expanded topics, sponsor support. Target = 100 workshops 100% attendee growth (excluding Thrive)	Target	2020-01-01	2020-03-31	100
	Actual	2019-01-01	2019-12-31	85
	Actual	2020-01-01	2020-03-31	85

32 workshops to date (3/9) flat vs.. 2019, - 6.8% attendees (impact of NA w/ SERG). Total services +7.3% YTD vs. 2019

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3.4B. Schools & Colleges

Grow working relationship with schools and colleges.

Stakeholder(s):

Schools

Colleges

Performance Indicators

3.4B.1 Relationships

Description	Type	Status	Start Date	End Date
Pursue and enhance relationships with schools and colleges. Target = May River HS successful program execution, TCL-SCORE initial program (eg. Workshops) successfully initiated.	Target		2020-01-01	2020-03-31
	Actual	Established	2019-01-01	2019-12-31
	Actual		2020-01-01	2020-03-31

Q1/2: DECA May River HS, TCL Entrepreneur class

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Administrative Information

Start Date: 2020-01-01

End Date: 2020-12-31

Publication Date: 2020-03-10

Submitter:

Given Name: Owen

Surname: Ambur

Email: Owen.Ambur@verizon.net

Phone:

_04f87974-6348-11ea-8a29-bcb2dff5fe3b