



Purpose

The BBBS 2026 Environmental Scan is foundational and the first phase of a multi-year journey. The purpose of BBBS 2026 Environmental Scan is to hold an objective mirror up to the Big Brothers Big Sisters of Canada federation to reflect not what we wish to be, but what we are (at this moment in time) and then to purposefully create a path to where we want to be in the future. **The internal and external landscape was examined across six domains.**



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AUTHORS AND REVIEW

The Environmental Scan was conducted between January and March 2026. It was primarily authored by members of the BBBS Strategy Department: Nina Shukla, M.H.Sc., National Vice President, Strategy, and Dr. Kaitlyn Parks, PhD, National Data Analyst and reviewed by the Strategic Plan Task Group of the National Board of Directors (internal and external experts), NMC (National Management Council of Agency Executive Directors) and BBBS's Senior Leadership Team.

REQUIRED PREPARATION FOR THE VISIONING SESSIONS

There is a lot of information in this summary. It is very important that you read it carefully and take time to think about your answers to the strategic questions. As you prepare, we ask that you set aside your individual agency perspective and approach this work with a broader, collective lens while placing mentees at the centre of your thinking and decisions.

INFORMATION AND DATA GATHERING PROCESS

We gratefully acknowledge the broad perspectives provided by internal and external stakeholders to provide the data on which the Environmental Scan is based.

Information was gathered through focus groups or interviews with: mentees and their families, mentors, agency executive directors, service delivery staff, agency board members, funders, government, academics, teachers, law enforcement, healthcare workers, Big Brothers Big Sisters of America, experts in the youth space; and a review of public sources such as impact reports, T3010 filings and academic research. For detailed information on focus group analysis methodology and data sources please refer to the *Supporting Information* section on pages 19-23. The Full Environmental Scan will be available to provide further detailed and comprehensive analysis.



Who We Serve

Mentees

Mentees

Key Findings in 2026

33,709*

Mentees in 2024
(Height of 42,023 in 2013)

* Compared to other organisations.
BBBSA: 91,289 (1:1 only), BGC: 135,966,
YMCA: 62,088, YWCA: 70,000, Girl
Guides Canada: 60,611, Scouts Canada:
45,942, Junior Achievement: 499,571,
Pathways to Education: 5,000

9-14

Primary Age
(Average is 12)

57%

Girls

42%

Boys

0.5%

Other

60%

with 4+ ACEs

52%

**White/
European**

21%

Indigenous
(First Nations,
Métis, or Inuit)

13%

Asian

10%

**Black/
African**

Mentees have increasingly complex needs, including mental health, trauma, neurodivergence and social disconnection

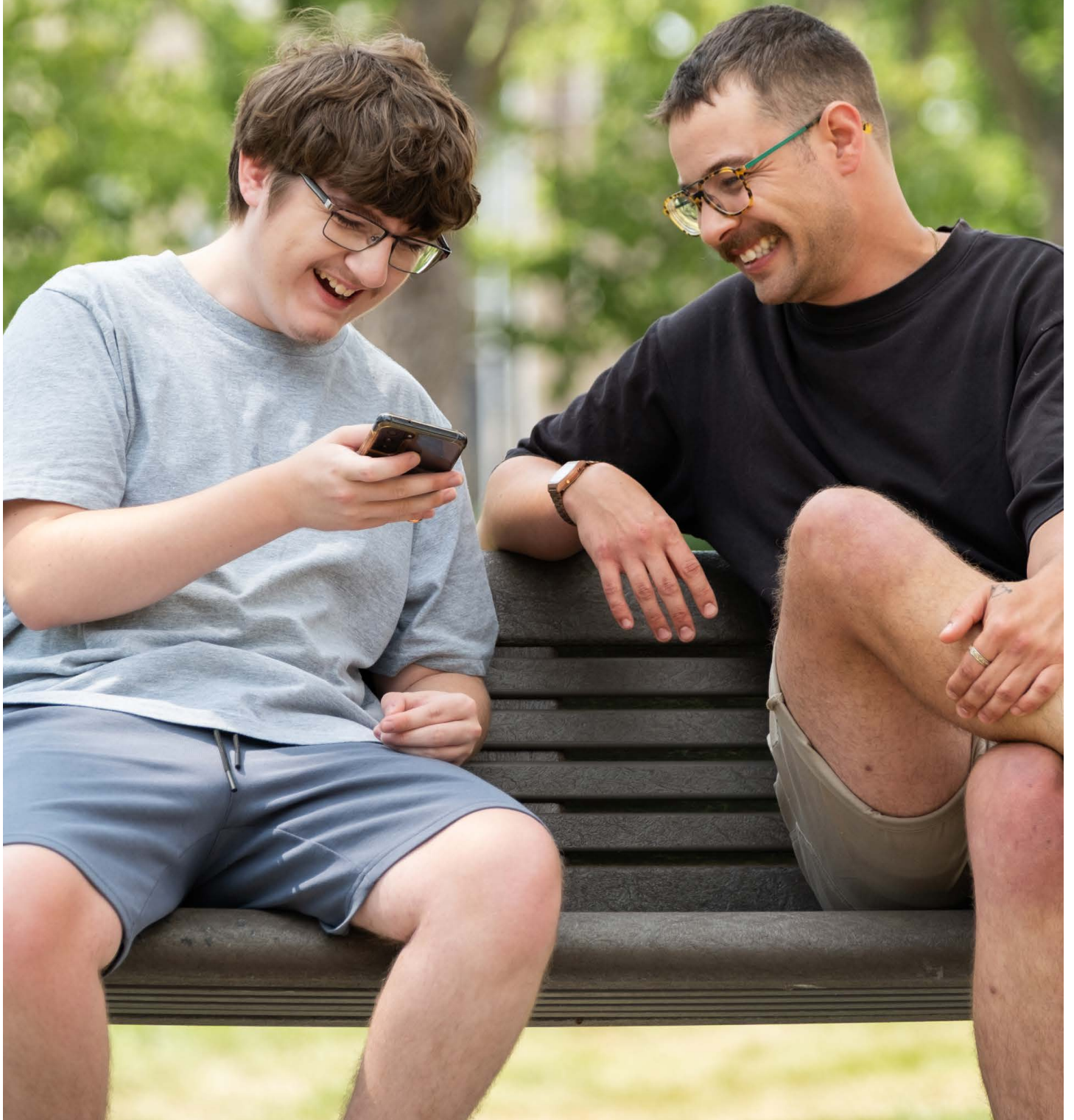
Waitlists are growing, particularly for boys and older mentees, with male mentor recruitment a challenge

Strategic Questions for Our Future

- As a Federation, is it more important to serve more mentees or provide deeper impact?
- If we were to focus on the mentees who most benefit from our programs and how would you define that group?
- What partners could help us serve those mentees?
- How will we equip ourselves to address mentees' increasingly complex needs?

What We Deliver and How

Initiatives



Initiatives (Programs, Mentors and Partnerships)

BBBS Program Models

	1:1 Community-Based	1:1 School/Site Based	Group Programs
Mentees Served	21%	25%	54%
Average Length of Match	958 days	247 days	103 days
Cost per youth	\$2,298.68	\$2,161.58	\$1,851.20
Mentors	39%	42%	19%
Model Strengths	<p>Deep relationships: Strong matches can last throughout developmental stages</p> <p>Family engagement: Caregivers and families involved in mentor/mentee match relationship</p>	<p>Wraparound services: Meets youth where they are and working alongside other supportive adults in their lives</p>	<p>Serve more youth: Including those on waitlists</p> <p>Multiple relationships: Relationships can form with peers and multiple mentors</p> <p>Clear Focus: Allows focus on shared interests or needs (e.g., community identity, gender, skill development)</p>
Model Challenges	<p>Long waitlists: (average 18 to 24 months) due to difficulties in volunteer recruitment and retention, driven by:</p> <ul style="list-style-type: none"> • Time commitment • Responsibility and perceived risk • Travel requirements • Increasing complexity of youth needs • Boys waiting longer to be matched 	<p>Partnership dependence: Requires strong and reliable partnerships with schools and access to a school liaison</p>	<p>Benefits not captured: Current reporting does not reflect the full benefits of group mentoring indicated in the literature</p> <p>Inconsistent programs: 200+ program types and lengths across Federation with inconsistent naming, make reporting difficult</p>
Competitor Lens	<p>Unique model: No other youth organization is offering a long-term 1:1 mentoring model centered on developmental relationships</p>	<p>Sector context: Other organizations, like Pathways to Education, offer school-based mentoring</p>	<p>Unclear differentiation: Not clear how BBBS group programs differ from other youth organization group programs. 6 other national youth serving organisations include mentoring in their services</p>
Agency Perspective	<p>Core to BBBS identity: Should continue to exist in some capacity. Enduring nature of relationships surpasses short-term support by youth mental health agencies</p>	<p>Strong and scalable: Widely seen across the network as a strong and scalable model</p>	<p>Critical to meeting community needs: Especially in rural or remote areas where BBBS is one of the few youth serving organizations</p>
Agencies Measuring Developmental Relationship in SDP	68%	68%	23%

Key Findings in 2026

Agencies are seeking clearer and more consistent standards to define our programs

Volunteers declined by 28% from 25,467 in 2012 to 18,227 in 2024 and prefer structured settings such as schools or community spaces, rather than meeting in the community

Volunteer rate in Canada has declined by 8% from 2018 to 2023

Youth are seeking safe “third spaces” outside of home and school where they can connect and build relationships

Funders are focused on youth wellness including wraparound supports and cross-organization collaboration

There are opportunities to embed mentoring in larger youth-serving environments and partnerships, such as schools and Youth Wellness Hubs

Hybrid models (virtual and in person) are increasingly popular for delivering mentoring services because they extend reach while maintaining relationship depth and flexibility

Strategic Questions for Our Future

- What changes would you make to all programs to reduce volunteer recruitment challenges?
- What changes would you make to volunteer recruitment strategies?
- Which partnerships and systems that youth are already in should be used to deliver our mentor programs?
- What other innovative models of delivery should we explore?
- How can we differentiate BBBS group programs from others in the youth sector?
- How should we ensure all BBBS programs have consistent core elements while still allowing for local differences?



What Impact We Deliver

Impact Measurement

Impact Measurement

Key Findings in 2026

Practices and systems for collecting data are inconsistent which makes it difficult to clearly communicate the federation's impact and agencies are asking for National support to unify evaluation

Impact is often demonstrated through stories or anecdotes that are not systematically coded or analyzed qualitatively, and quantitative measures are not consistently validated

Other mentoring programs track transition to post-secondary, scholarships awarded and school absenteeism changes. Educators report BBBS in-school mentoring leads to decreased absenteeism, fewer behavioural incidents, and improved grades for mentees (anecdotally)

Our societal return on investment (ROI) statistic is outdated (from 2013 Boston Consulting Report: [\$1 = \$18 on average and 1 = \$23 for disadvantaged youth]) and agencies expressed that an updated one would be helpful as a sector expectation

We have no national measurement for benefits to family

We have no national measurement for benefits to mentors



Key Findings in 2026

| 1:1 Impact Logic Model:

- 68% of agencies measure Developmental Relationships which automatically produce Theory of Change Outcomes as confirmed by academic research
- ~20% of agencies measure Theory of Change Outcomes directly
- Pilot Study of the National Outcome Tool (Big 3 Growth Survey) showed statistically significant gains across all three outcomes with strongest shift in mentees' ability to handle challenges, improvements in school confidence, empathy, and help-seeking
- **Caregivers support model:** *"[My son] went from bottling things up to becoming this open, kind-hearted kid. Having someone consistent in his life changed him. I don't have enough words to say how much it changed him."*

| Group Impact Logic Model:

- 23% agencies measure Developmental Relationships which is not confirmed by academic research to automatically produce Theory of Change Outcomes
- Likely < 10% agencies measure Theory of Change Outcomes as confirmed by academic research on mentoring outcomes
- **Caregivers support model:** *"As a parent, it's just nice to have somewhere [my daughter] can go directly. It's nice that it's in the gym so she can just walk there after school...don't have to leave the school property."*

Strategic Questions for Our Future

- Do we need to demonstrate impact with data?
- Should we conduct a review on how we collect data and what data we collect?
- Is measuring the strength of the developmental relationship enough to demonstrate impact or do we need to measure outcome data?
- Should we have a separate Theory of Change for 1:1 and group programs?
- Should we update research and show BBBSC's societal return on investment?

How We Operate

Costing and Operating Model



Costing and Operating Model

Key Findings in 2026

It costs an average of \$2,302* to serve a mentee annually across the network. The median cost per youth is \$2,432* with a reasonable range for cost per youth across agencies is approximately \$726 to \$11,300*



We have not measured whether agency location is correlated to service need

Mechanisms exist for cross-agency collaboration (e.g., NMC, regional meetings, working groups) that strengthen unity across the network

Agencies report:

- operating at or beyond capacity
- rising demand for services
- staffing levels have not kept pace with demand
- internal infrastructure constraints
- duplication of work across the federation
- need for greater access to shared services (already happening with service delivery staff, finance, impact/evaluation)
- need for increased centralized support

Insurance represents the single largest, mandatory fixed cost for every agency in the Federation

Research suggests that algorithm-supported matching can improve efficiency and consistency at scale but should be paired with human oversight to ensure fit, safety, and relationship quality. Well-trained, highly-skilled service delivery staff is essential.

Big Brothers Big Sisters of America tracks agency strength using several indicators: Financial Stability, Program & Impact, Board Engagement, People & Culture

Other National federated non-profits have adapted their models in recent years:


- **United Way Canada:** 110 local offices to 56
- **YMCA Canada:** 51 member associations to 37
- **BBBSA:** 357 agencies to 230

*To reduce the influence of extreme outliers (\$340 to \$42,714 per youth) the lowest and highest 5% of agency cost-per-youth values were removed in these calculations.

Strategic Questions for Our Future

- How should we evaluate agency health?
- Should we explore a new Federation model with fewer agencies if we have a way to reach mentees in as many communities?
- What challenges would you expect the new model to solve?
- Should we explore AI use for algorithm-driven matches?





How We Generate Revenue

Funding

Funding

Key Findings in 2026

- No national measurement of financial health of agencies
- 58% of agencies report deficits and 42% report surpluses
- Agency sources of funding as reported in T3010s: non-receipted donations (32%), government funding (21%), gifts from other registered charities (21%), other revenue sources account (15%), receipted donations (11%)
- National office does not provide the level of flow-through funding that operationally sustains agencies
- Name recognition leads to unsolicited donations; with its 110+ year history, Big Brothers Big Sisters is an investable brand
- The current core services provided by the National Office do not include any program, impact or training deliverables
- Corporate giving is shifting from one-time sponsorships to deeper partnerships with fewer organizations. Companies are placing more emphasis on clear, measurable impact and alignment with their public commitments. At least 40% of current corporate partners demonstrate a commitment to engaging their workforce to address BBBS needs and gaps, like volunteer shortage.
- Government funding is no longer renewed automatically, requiring emphasis on transparent processes, outcomes, stewardship, and commitment to equity and inclusion

Strategic Questions for Our Future

- **Are we able to raise enough money to serve mentees? If not, what do we need to change?**
- **What evidence of impact do funders want from BBBS?**
- **What areas (channels, sources) of fundraising (excluding Government) are best achieved within local communities?**
- **What national and local community funding partnerships could support our work?**

How BBBS / GFGS is Perceived

Brand



Brand

Key Findings

| No national measurement of brand health

| Our initiatives and impact are not easily understood or articulated internally or externally

| Our brand relevance as an organisation is not clear

| 6 other national youth serving organisations (*United Way, BGC, Pathways, Junior Achievement, YMCA, YWCA*) include mentoring in their service offerings, leading to brand confusion

| Questions have been raised about whether the name “BBBS” reflects gender inclusivity and whether the labels “Big” and “Little” are appropriate, but these have never been verified through a brand study

The National Office receives unsolicited funding from partners each year, who cite alignment between BBBS and their Corporate Social Responsibility (CSR) and Environmental, Social and Governance (ESG) priorities

Organic Google search impressions for key BBBS pages (e.g., “Find an Agency” and “What We Do”) increased ~28–29% year-over-year, reaching ~59K in December 2025. Growth in organic search results continued even without an active digital campaign.

Strategic Questions for Our Future

- Do you think that a brand assessment would provide clarity to better support agencies to better serve youth?
- What research studies about the brand will address gaps in public knowledge?
How do we want our brand be perceived by communities, volunteers, funders, and partners?
- Does our brand reflect our commitment to inclusivity?
- What do we need to do to ensure child safety is clearly reflected in all our brand interactions?

What's Next?

This Environmental Scan Summary contains a lot of information. The next step is for us to identify **the "what"** - meaning what areas we want to prioritize in the Strategic Plan. This will happen during Visioning Sessions in April (In-person) at Convention and May (Virtually) for those Agencies not attending Convention.

What to expect at Visioning Sessions

Participants will be grouped and asked to imagine the following: "It is **2035 and the Big Brothers Big Sisters Federation is THRIVING**. What will be true about our Federation?" Guided by strategic questions, groups of agency leaders and service delivery staff will develop **"We Statements" that describe what BBBS will have become by 2035**. These statements will be grouped into themes that will form the core pillars of the Federation's strategic plan. You are one of the architects of our thriving future.

What to Prepare

It is very important that you take time to think about your answers to the strategic questions above. As you prepare, please approach this work with a broader, collective lens while placing mentees at the centre of your thinking and decisions. Once we have the big vision, the "what", we will work together to create the "how".



Supporting Information

Statistics and Costing Data Methodology:

DATA SOURCES AND ANALYTICAL APPROACH

All analyses were conducted using agencies' most recent publicly available T3010 filings from the Canada Revenue Agency and self-reported 2024 youth reach data submitted to BBBS. These sources were used because they provided the most complete and comparable dataset available at the time of analysis. Where required, data were aggregated across agencies or regions to support network-level estimates. Please see a more detailed breakdown of each analysis below.

COST PER YOUTH SERVED ACROSS PROGRAMS

For each agency, an annual cost per mentee was calculated by dividing gross operating budget by total youth served. To reduce the influence of extreme values, a 10% trimmed range was applied by excluding the lowest and highest 5% of per-mentee cost estimates. A weighted average was then calculated by dividing the total combined budgets of the remaining agencies by their combined youth served.

COST PER YOUTH SERVED BY PROGRAM MODEL

To estimate how costs vary across mentoring program models, a top-down allocation approach was used. While program-level reach data were available at the agency level, financial data are only reported as a single total operating budget per agency and are not broken down by program model. As a result, program-specific costs cannot be directly calculated without making unsupported assumptions about how budgets are distributed across programs.

To address this, costs and reach were aligned at the regional level. For each region, an average cost per youth was calculated by dividing the total regional budget by the total number of youth served. This regional cost per youth was then applied to the number of youth served within each program model to estimate total spending by model, which was aggregated to produce national-level estimates.

This approach ensures internal consistency by matching the level of aggregation between cost and reach and produces a weighted estimate based on the distribution of youth served across regions. However, estimates should be interpreted with caution, as they assume costs are distributed evenly across program types and are therefore likely to understate true differences between models.

PERCENT OF MENTEEES SERVED BY NUMBER OF AGENCIES

A Pareto analysis was conducted to examine how youth served are distributed across agencies. This approach is used to understand concentration; specifically how many agencies account for a given share of total youth served. Agencies were ranked from largest to smallest based on the number of youth served in 2024 (as reported by agencies), and a cumulative total was calculated to determine the proportion of youth served as agencies were added sequentially. This allowed for identification of how many agencies account for key thresholds (e.g., 80%) of youth served across the network.

The same approach was applied by program type. For this analysis, programs were aggregated into two categories based on delivery model: 1:1 mentoring (including both community-based and school/site-based programs) and group mentoring. This aggregation was used to provide a clear, high-level comparison between the two primary modes of service delivery, while maintaining sufficient sample size and consistency across agencies. Within each category, agencies were ranked by the number of youth served, and cumulative proportions were calculated to assess how participation is concentrated across the network.

Focus Group Analysis Methodology:

DATA COLLECTION

Data were collected through structured focus groups held separately with agency frontline staff, agency senior leadership, agency board members, current/alumni volunteers and lapsed volunteers. Sessions ran for approximately 1 to 1.5 hours. Conversations were recorded and transcribed for analysis.

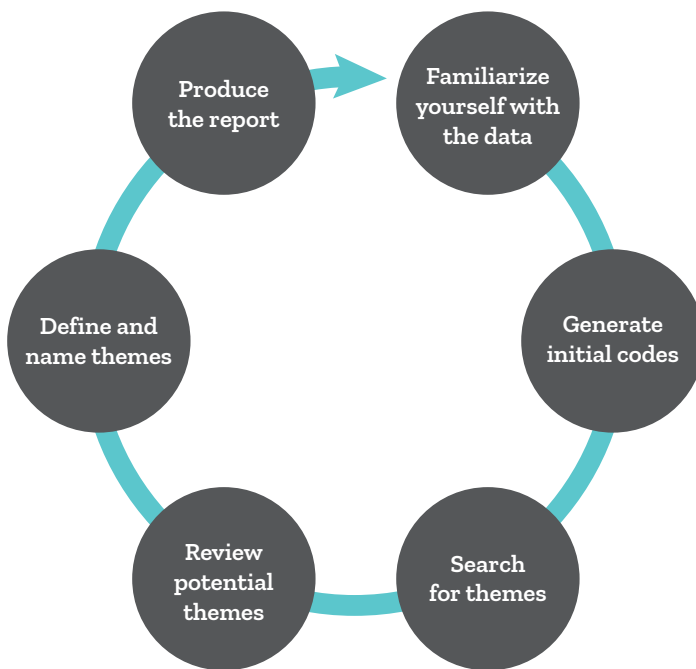
DATA ANALYSIS

Thematic analysis is a qualitative method used to identify patterned meaning across a dataset. It is well suited to focus group research because it allows for the systematic interpretation of shared perspectives while remaining flexible enough to capture nuance and variation.

This approach allows for the identification of broad patterns that reflect how participants understand their context, challenges, and priorities (see Figure 1 for the thematic analysis cycle created by researchers Braun and Clarke).

Figure 1 The continuous cycle of Thematic Analysis (adapted from Braun & Clarke, 2006, 2013).

Themes were derived using Braun and Clarke's six-phase thematic analysis framework.



- **First**, transcripts were read and re-read to ensure familiarity with the data. Initial notes were recorded to capture early impressions and recurring ideas.
- **Second**, the transcripts were coded line by line. Codes reflected both semantic content, such as direct statements about funding or volunteer supply, and underlying patterns related to risk or brand identity.
- **Third**, related codes were grouped into candidate themes. These themes reflected patterned responses across participants in respective focus groups.
- **Fourth**, themes were reviewed against the full dataset to ensure internal coherence and distinction between themes. During this stage, some themes were combined or redefined to better reflect the data.
- **Fifth**, themes were clearly defined and named to capture their central organizing concept. Supporting quotations were selected to demonstrate how each theme was grounded in participant language.
- **Finally**, findings were written as an analytic narrative that integrates theme descriptions with illustrative excerpts.

Rigor was supported through systematic coding of all transcripts, iterative theme refinement, and verification that themes were supported by multiple excerpts across participants. Care was taken to ensure that themes reflected shared patterns rather than individual viewpoints. Direct quotations are presented to maintain transparency and preserve participant voice.

Participants – Agency Focus Groups

A total of 77 individuals participated across three sets of focus groups, including 33 frontline service delivery staff, 32 senior leadership staff, and 12 local agency board members. Participants represented 27 unique agencies across the federation, accounting for approximately 32% of active agencies across the federation, and reflected a mix of small, medium, and large organizations across Ontario, the Prairies, Western Canada, Atlantic Canada, and Québec (see Tables 1-3 and Figure 2).

Frontline participants were primarily responsible for intake and enrollment, match support, case management, volunteer coordination, program delivery, and fund development, with many staff working across multiple functions. Leadership participants included Executive Directors and senior leadership team members responsible for organizational strategy, operations, financial sustainability, staff supervision, and community partnerships. Agency board members included both Board Chairs and Directors responsible for governance oversight related to organizational strategy, fiduciary accountability, and community representation.

Across groups, tenure ranged from less than two years to more than fifteen years, capturing both newer participants and individuals with long-standing system knowledge. On average, service delivery participants reported approximately 7 years of tenure, while senior leaders averaged approximately 10 years of tenure. Agency board members averaged approximately 5–6 years of tenure (see Table 1).

Participating agencies represented a broad cross-section of the federation. The majority were small agencies (62%), followed by medium (27%) and large agencies (11%) (see Figure 2 and Table 2).

Table 1 Focus Group Participant Characteristics (n = 77)

Participant Group	n	Regions Represented	Average Tenure	Typical Roles
Service Delivery Staff	33	Ontario, Prairies, Western Canada, Atlantic Canada	~ 7 years	Volunteer enrollment/intake staff, case managers, program staff, fund development staff, and other frontline program roles
Senior Leadership	32	Ontario, Prairies, Western Canada, Quebec, Atlantic Canada	~ 10 years	Executive Directors, senior leadership, and other agency leaders responsible for strategy, operations, or evaluation
Agency Board Members	12	Ontario, Western Canada, Prairies, Quebec	~5-6 years	Board Chairs and Directors responsible for governance, strategic oversight, fiduciary accountability, and community representation

Figure 2
Distribution of participating agencies by size

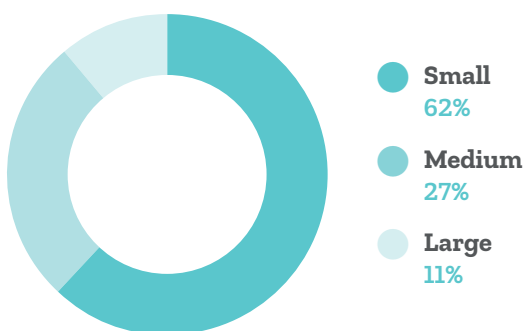


Table 2 Agency Representation in Focus Groups

Agency Characteristic	Count	Percent
Small agencies	17	62% of participating agencies
Medium agencies	7	27% of participating agencies
Large agencies	3	11% of participating agencies

Note: Agency size categories reflect BBBSC membership dues classifications. Less than \$31,000 = small, between \$31,000 and \$61,000 = medium, greater than \$61,000 = large; Unique agencies = ~32% active agencies participated in the focus groups.

Table 3 Regional Representation of Agencies

Region	Agencies Represented
Ontario	Barrie, Dufferin, GEHH, Lanark, London, Niagara, North Simcoe, Ottawa, Oxford County, Waterloo
Prairies	Regina, Saskatoon, Winnipeg, Yorkton, Prince Albert, Central Plains
West	Calgary, Edmonton, Fraser Valley, Grande Prairie, Medicine Hat, Red Deer, Vancouver, Wood Buffalo
Atlantic	Colchester East Hants, Pictou County
Quebec	Montreal

Note: GEHH = Grand Erie, Halton, & Hamilton.

Participants – Volunteer Focus Groups

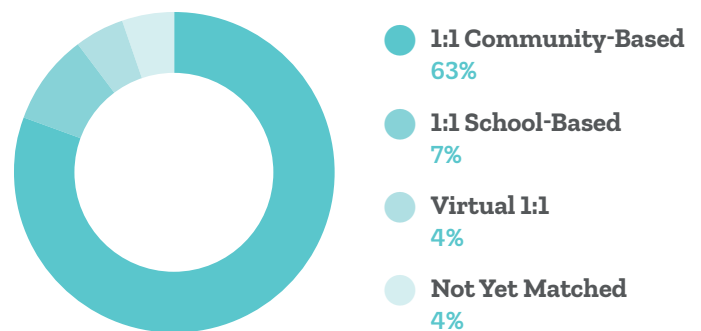
A total of 27 volunteers participated in the volunteer focus groups. Among participants, 59% were current volunteers, 26% were alumni volunteers, and another 15% were lapsed volunteers who had begun but not completed the volunteer onboarding process (see Table 4).

Table 4 Volunteer Status of Focus Group Participants (n = 27)

Volunteer Status	n	%
Current volunteer	16	59%
Alumni volunteer	7	26%
Lapsed volunteer	4	15%

More than half of the volunteers had experience in 1:1 community-based mentoring. A smaller number participated in 1:1 school-based programs, and one volunteer was part of a virtual 1:1 mentoring program. Program type information was not reported for 22% of participants (see Figure 3).

Figure 3 Program Type Reported by Volunteers



Note: A total of 17 participants were in 1:1 community-based matches, 2 were in 1:1 school-based matches, 1 was in a virtual 1:1 match, and 1 had just started and not yet been matched. Program type information was not available for 6 participants (22%).

Approximately 10% of agencies were represented across the federation and reflected a mix of small, medium, and large organizations (see Figure 4) across Ontario, the Prairies, Western Canada, and Québec/Eastern Canada. Of the 8 agencies represented, 38% were small agencies 25% were medium agencies, and 38% were large agencies (see Tables 5 and 6).

Table 5 Regional Representation of Agencies

Region	Agencies Represented
Ontario	Toronto, Grey Bruce, Oxford County, Niagara
Prairies	Regina, Saskatoon
West	Calgary
Quebec	GFGS du Grand Montréal

Table 6 Size of Agency Representation

Agency Characteristic	Count	Percent
Small agencies	3	38% of participating agencies
Medium agencies	2	25% of participating agencies
Large agencies	3	38% of participating agencies

Note: Agency size categories reflect BBBS membership dues classifications. Less than \$31,000 = small, between \$31,000 and \$61,000 = medium, greater than \$61,000 = large; Unique agencies = ~10% active agencies participated in the volunteer focus groups.

Figure 4
Distribution of participating agencies by size

