



Strategic Plan Overview

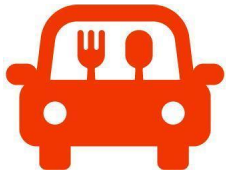
Mission	End hunger and food waste
Vision	A food secure world with zero food waste
Values	<ul style="list-style-type: none">• Curious• Collaborative• Resourceful• Intentional• Generous
Strategic Priorities	<ul style="list-style-type: none">• Saturate metro-Atlanta so everyone has food security• Become a talent magnet• Enhance data and technology systems• Bolster fundraising & marketing efforts• Fortify SHA's staff and Board leadership to drive sustainable, long-term growth
Big Bold Goal*	A food secure metro Atlanta

**The Big Bold Goal is an aspirational and ambitious goal that could take decades to achieve.*



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Planning Process Description

Second Helpings Atlanta (SHA) sought a planning process to develop a strategic framework that:

- Reviews and updates the mission, vision, and values
- Offers a guiding map for program growth, resource development, and resource deployment
- Ensures continued strength and growth at all levels of the organization: programs, operations, management, and governance.

Toward this end, SHA engaged Dolph Goldenburg and Lexie Linger of Successful Nonprofits® to facilitate a participatory planning process. As part of the planning process, two staff members and five Board member agreed to serve on the Strategic Planning Work Group:

- Paul Clements, Executive Director
- Katie Maxwell, Operations and Data Manager
- Dan Sterling, Board President
- Lisa Boren Sivy, Immediate Past Board President
- Bob Gallagher, Board Treasurer
- Deep Kalina, Board Member
- Lyle Warshauer, Board Member
- Andrea Jaron, Former Executive Director

The Work Group and consultants began the Environmental Scan process in September 2022. This included:

- Reviewing financial and fundraising trends, program outcomes, and Board performance
- Interviewing key stakeholders
- Identifying a benchmark partner and conducting a learning journey

Based on the results of the Environmental Scan, the Work Group drafted recommendations for the mission, vision, Big Bold Goal, and strategic



priorities. SHA staff had recently developed a guiding values statement, and the planning process included staff to build on the proposed values statement.

The Work Group presented the results of the Environmental Scan and recommendations at a full-day, in-person Board retreat. The interactive retreat included opportunities for Board members to provide feedback, align on the plan's strategic priorities and goals, and make additional recommendations for the final plan.

Staff leadership were also invited to participate in the Board retreat. They, with the support of the consultants, drafted annual objectives and year one tactics based on the priorities and goals identified at the retreat.

Using this information, the Work Group finalized the strategic plan draft. The Board approved the plan on November 29, 2023.



Environmental Scan Results

Financial Analysis

The Work Group analyzed four years of 990s and FY 2022's internal financial reports to identify trends and opportunities for growth. Since SHA is in a strong financial position the Work Group explored ways to reinforce and leverage SHA's financial position, including potential capacity building investments.

Due to the large volume of in-kind food donations, the Work Group explored SHA's revenue, expense, and net both with and without in-kind contributions (figures A and B respectively). Both figures illustrate consistent, steady growth and net surpluses over the prior five years.

Total Revenue, Expense, Net



Figure A



Revenue, Expense, Net (without in-kind)



Figure B

The Work Group reviewed SHA's cash reserves (Figure C), noting that SHA has an above-average reserve. While maintaining a strong reserve of 6 to 9 months of operating costs is essential to ensuring SHA's future security and stability, excess funds may be available for investing in capacity building and sustainability efforts in alignment with the strategic plan.



Cash as Days of Operating (Without In-Kind)

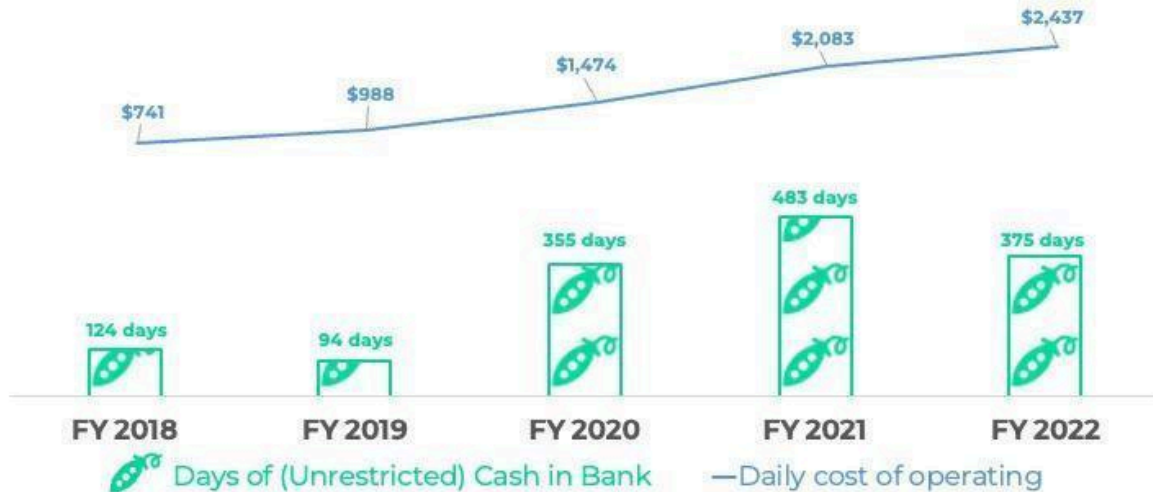


Figure C

Based on the results of the Financial Analysis, opportunities for SHA include:

- Maintaining 6 to 9 months of operating reserves
- Developing policies to invest excess funds in capacity building or sustainability efforts

Fundraising Analysis

The Work Group analyzed five years of SHA's fundraising data (without in-kind) to explore trends and opportunities for growth. Again, the results of this analysis demonstrate that SHA's intentional fundraising and marketing investments resulted in a substantial return on investment and diversification of funding sources. For this reason, the Work Group explored ways to elevate SHA's fundraising to support growth and sustainability.

Figure D shows a comparison of SHA's funding source by percent in 2018 and 2022. During this period, SHA achieved a balanced and healthy diversification of revenue.



Funding Source by Percentage

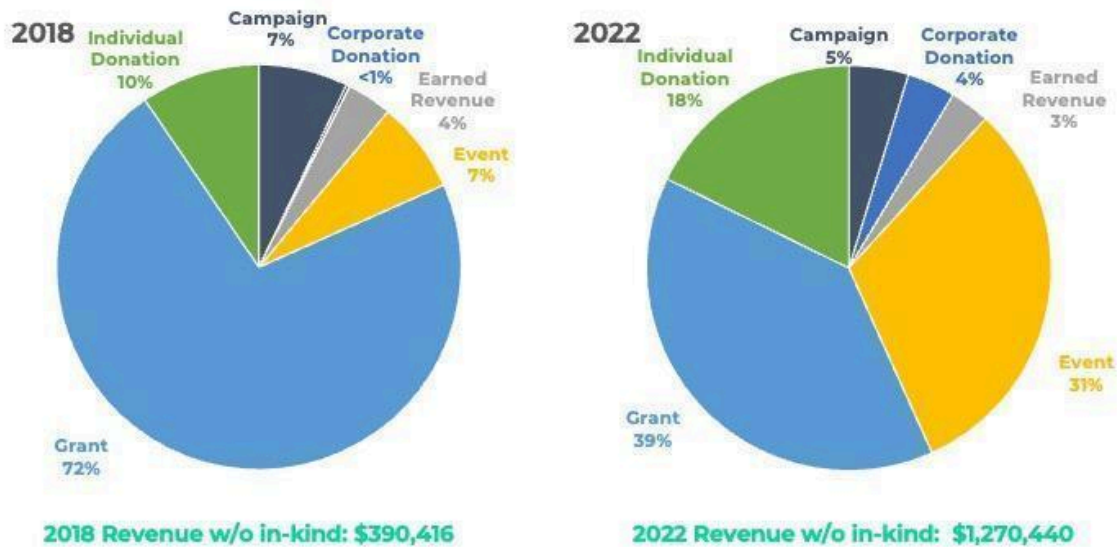


Figure D

The growth in revenue from events is especially noteworthy. In 2022, SHA hosted its first large fundraising event, Full Plates Full Hearts (FPFH). This event successfully engaged new corporate and individual donors and provided an opportunity to cultivate existing donors.

The strong results from the event underscored the need to invest in additional fundraising and development staff. Engaging new donors while stewarding existing relationships will require additional staff effort, and a dedicated fundraising team is essential to successfully engage and retain donors.

Additionally, large events like FPFH require significant staff time and resources. For this reason, SHA must determine the role of large events in the overall fundraising strategy and recruit staff or engage contractors to support future events. This is also essential for ensuring that fundraising does not interfere with the operational and program duties of other staff.



In reviewing the revenue sources, the Work Group also considered the absolute dollars each revenue source generates (Figure E). This data demonstrated two key points. First, total revenue from corporate donations remained relatively consistent since 2019, experiencing neither a significant increase nor decrease. While COVID-19 certainly limited opportunities, the ongoing return to “normal” has significantly increased possibilities for expanding this revenue source. Second, grants revenue steadily declined from 2019 to 2021 before rising by 42% in 2022. This was the result of a particular focus on grant writing, which supports continued investment in grant seeking efforts.

Funding Source by Absolute Dollar



Figure E

Figure E also revealed a significant increase in individual and household donor revenue in 2020, followed by a steady decline. Classification of donor revenue in SHA’s database skews this data because many individual donors were classified as “event income” through the Full Plates Full Hearts event.

SHA will benefit from additional investment in and expansion of the development and marketing team. A larger team can focus on opportunities



such as grants and individual and corporate donors. Such a team could also better enable donor stewardship, which will make SHA more competitive in a sector anticipating a decline in donors and donor revenue¹.

To consider all possible revenue sources, the Work Group also deliberated on earned revenue's role in SHA's strategy. Since SHA still has many untapped fundraising opportunities and there are inherent risks of an earned revenue strategy, this strategic plan focuses on traditional philanthropy instead of social enterprise. SHA recognizes that opportunities may arise to use current assets for earned revenue, and the organization will evaluate them using a decision screen to ensure they are consistent with the strategic plan.

Based on the results of the Fundraising Analysis, opportunities for SHA include:

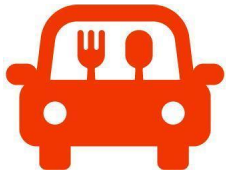
- Increasing individual and corporate donor revenue
- Defining SHA's fundraising strategy, including the role of large events
- Utilizing data to strengthen donor stewardship
- Investing in an internal development team

Stakeholder Analysis

The Stakeholder Analysis gathered useful perspectives about SHA from community members. The Work Group accomplished this by identifying and interviewing 50 stakeholders representing current and former Board members, staff leadership, volunteers, financial and food donors, partner agencies, and city officials. Additionally, the consultants conducted a focus group with 4 staff members.

The following key themes emerged from these conversations, which align with other Environmental Scan research:

¹ Fundraising Effectiveness Project. "2022 Fundraising Showed Substantial Weakness Through Q4." Association of Fundraising Professionals.



While stakeholders prioritize addressing hunger, food rescue is an essential component to SHA's identity and mission.

71% of stakeholders, including the majority of financial and food donors, believe providing access to food is SHA's most important activity. However, stakeholders also value the concept of solving one social problem with another by rescuing food destined for a landfill and providing it to partners that distribute food to households. Furthermore, the environmental benefits of food rescue appeal to a wider audience of in-kind and financial donors.

SHA would benefit from intentionally investing in marketing.

The most frequent answers to the question, "what do you wish more people knew about SHA?" included, in no particular order:

- SHA itself
- SHA's impact
- SHA's unique model
- The ease of volunteering

These answers suggest that enriching branding and marketing efforts can increase awareness of services and attract supporters (volunteers, financial donors, food donors, etc.).

SHA provides high quality services worthy of scaling.

Stakeholders spoke highly of SHA's food rescue and delivery services and recommend SHA saturation of currently underserved areas within metro Atlanta instead of expansion outside of the metro area. Stakeholders particularly noted neighborhoods and towns in metro Atlanta that classify as food deserts or have high rates of food insecurity.

Stakeholders also noted that saturating food deserts in metro Atlanta will require - informed approach that identifies areas of the greatest food waste and marshals the resources to transport this food to underserved areas.

This is an opportunity to re-evaluate the Food for Thought program.



Food for Thought started in 2019 to educate students about hunger and food waste in Atlanta and steps they can take to alleviate both. This program was also designed to be a tool to build community awareness of SHA among parents, teachers, and school staff. COVID related school shutdowns interrupted the program, which has yet to be fully re-established.

Therefore, this is an opportunity for SHA to re-evaluate the role Food for Thought could and should play in accomplishing its mission and marketing goals. Depending on the outcome of this evaluation, SHA will determine necessary changes to the program.

SHA would benefit from improved talent retention.

SHA defines “talent” as the people who share their time and skills with the organization to “end food hunger and waste.” SHA’s talent pool includes paid staff and volunteers at all levels of the organization (service, operations, and Board leadership).

Stakeholders spoke highly of SHA’s talent and value the passion, dedication, and expertise each brings to the organization. Though SHA has taken significant steps to retain staff and volunteers, COVID-19 and the tight labor market have made recruiting and retaining top talent challenging.

To build on these efforts and enhance SHA’s positive steps toward talent retention, the Work Group identified several themes emerging from the Stakeholder Analysis. The following themes apply to paid and volunteer talent:

- Foster an empathetic and compassionate culture
- Recognize people for their hard work in ways that make them feel appreciated
- Offer professional development and growth opportunities
- Practice justice, equity, diversity, and inclusion (JEDI) values
- Build positions with manageable work loads



One theme emerged that pertains just to paid staff: Review salaries and benefits to ensure competitive and equitable compensation.

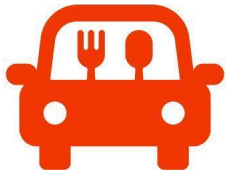
Based on the results of the Stakeholder Analysis, opportunities for SHA include:

- Build the internal capacity necessary for growth
- Focus on talent recruitment, development, and retention
- Invest in technology and logistics
- Expand marketing and branding through intentional investments
- Determine Food for Thought's role in SHA's mission and marketing
- Apply JEDI values across SHA's policies and practices
- Reach underserved communities in metro Atlanta
- Develop a strategy screen to guide important decisions

Program Analysis

The Work Group analyzed many years of program data to understand food donation sources, distribution networks, and identify opportunities for saturation in metro Atlanta.

Figure F shows the total pounds of food donated to SHA's programs and demonstrates SHA's significant program growth since its founding in 2011. Of note, the organization experienced particularly rapid growth since 2020 due to a new partnership with HelloFresh that supports both food rescue and meal packing (Full Plate) programs.



Total Pounds of Food Donated

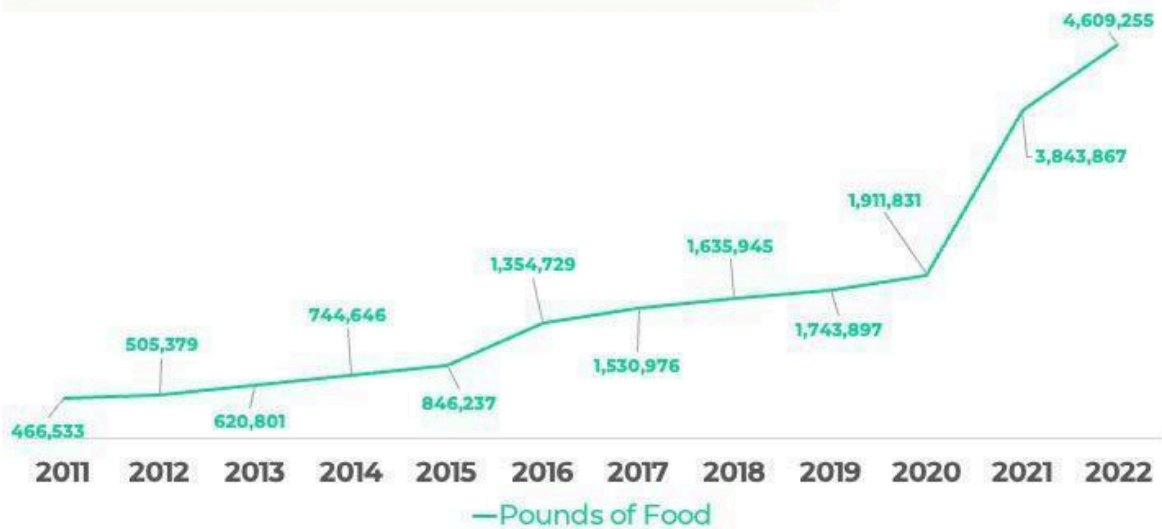


Figure F

The Work Group embarked on deep data analysis to understand food donors' contributions, summarized in Figure G. Donors contributing between 1,000 to 99,999 pounds of food annually provided most of SHA's food during its first decade. Partnerships with new donors and increasing contributions from existing donors in 2021 and 2022 caused this trend to shift; most of SHA's food now comes from donors contributing 100,000 pounds of food or more each year. These larger food donations came from 8 donors in 2021 and 12 in 2022. Much like with fundraising, SHA must continue to grow and diversify its pool of food donors to maintain service stability. This diversity can be achieved through a variety of strategies including cultivating new donors of all sizes and stewarding existing donors; the correct strategy varies by donor and community.



Food Donations by Donor Level

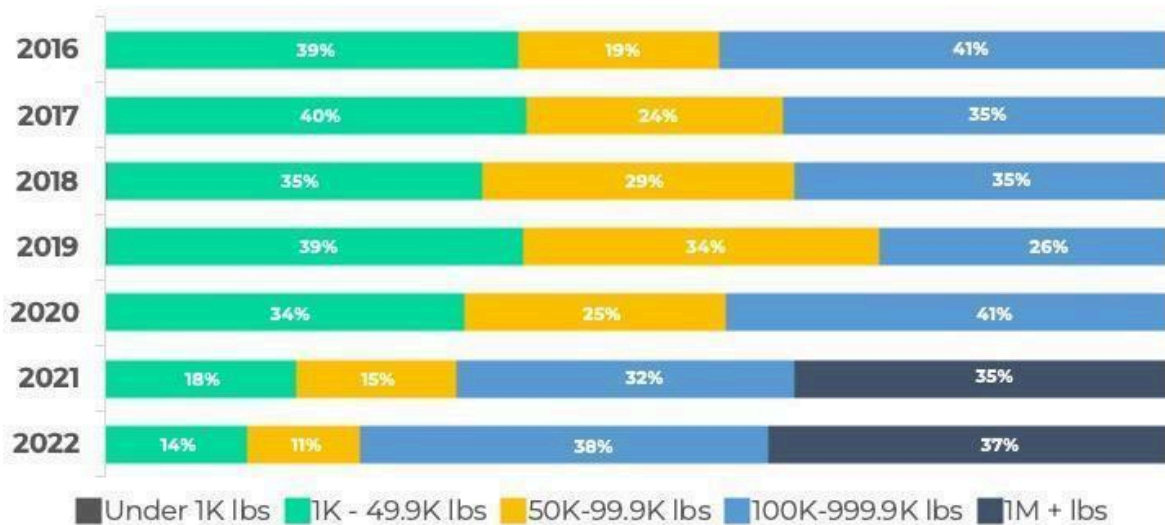


Figure G

The Work Group next sought to understand where SHA's food donations are distributed. In 2022, SHA worked with 122 partner agencies that received food from SHA and distributed it within their communities. As an aside, SHA increased the number of partner agencies by 94% since 2020.

Figure H is a USDA map of metro Atlanta food deserts with an overlay of SHA's 2022 food donors and receiving agencies. This map, in addition to poverty data, illustrates an opportunity for SHA to grow in size and impact by expanding into underserved areas.

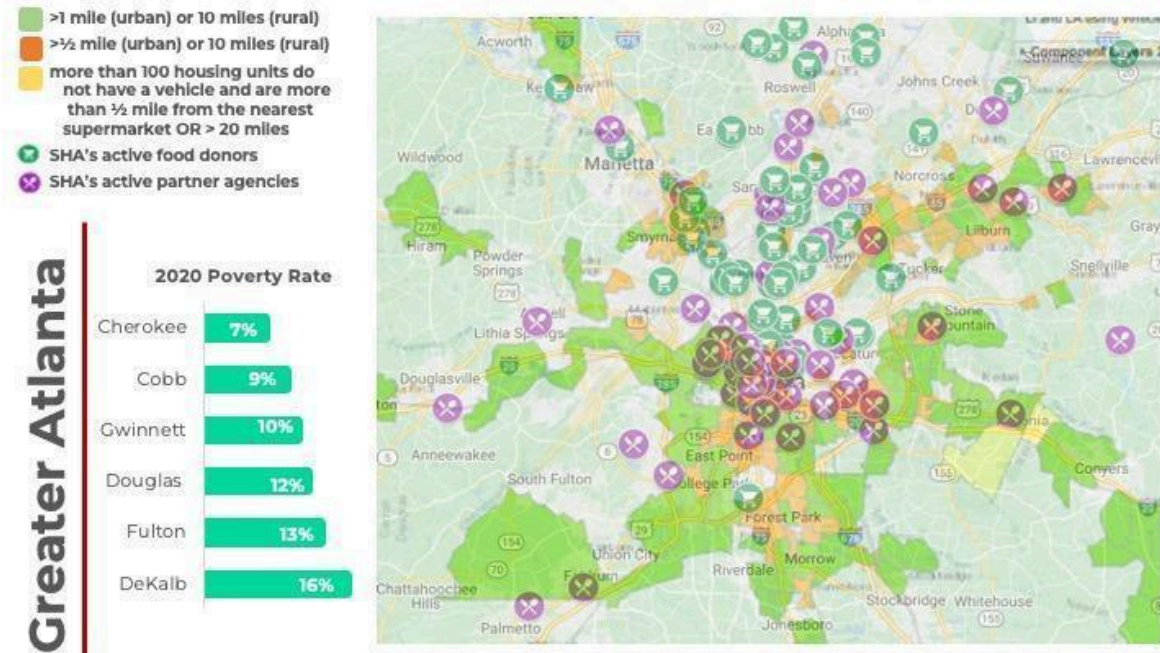


Figure H

Expanding into additional food deserts while maintaining quality services in currently served communities will require SHA to identify new strategies, such as diversifying partner agencies, developing new programs, and engaging volunteers in creative ways.

One identified strategy is a “block by block” approach to rescuing surplus food from every possible source and ensuring its safe delivery to a network of partner agencies serving clients directly. This strategy requires a dedicated team of volunteers supported by a full-time employee, data about resources and needs on each block, and cooperative local governments.

Based on the results of the Program Analysis, opportunities for SHA include:

- Diversify food donors and partner agencies for service stability and expansion
- Leverage existing assets in creative ways



- Explore new and creative program models
- Invest in the infrastructure necessary for program growth

Learning Journey

A Learning Journey initiates and builds a mentoring relationship with a benchmark organization that has achieved significant growth and attained goals aligned with SHA's strategic framework. The Work Group selected 412 Food Rescue in Pittsburgh, PA as our benchmark Learning Journey partner. Established in 2015, 412 has annual revenue of \$17.8M (\$4.5M without in-kind food donations) and employed 35 staff members in 2021. In addition to running local food rescue routes, 412 developed and licenses an app for food rescue organizations. 412 is also developing an informal association of food rescue organizations across the nation. While SHA was curious about 412's app, the Learning Journey focused on 412's local food rescue operations.

Work Group members and consultant, Lexie Linger, spent a full day on-site shadowing 412's programs and meeting with leadership. They presented key lessons to the Work Group for discussion, and the Work group aligned on the primary goal of saturating metro Atlanta to ensure everyone is food secure. The Learning Journey solidified four pillars to help SHA accomplish this: (1) programs, (2) talent, (3) marketing and fundraising, and (4) data and technology. These pillars, as summarized in Figure I, align with the Environmental Scan results.



Figure I

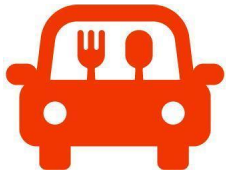
Following the Learning Journey, SHA carefully considered the benefits of developing and supporting its own technology platform. The Work Group determined that leveraging existing technology solutions is a better use of the organization’s resources.

Board Analysis

Finally, the Work Group explored several key areas of Board performance. The consultants spoke with Board members regarding their understanding of Board expectations, onboarding experiences, and opportunities to strengthen the Board. The consultants also analyzed some board metrics, such as meeting attendance and participation in philanthropy. The following themes emerged:

Board members have a thorough understanding of Board expectations.

Board members not only understand the expectations of Board service, most also fulfill those expectations. The average Board meeting



attendance is well above average at 86% and 100% of Board members are participating in fundraising and making personal contributions. Therefore, the Work Group explored opportunities to build upon these strengths:

- As with many nonprofits, COVID disrupted SHA's new Board member onboarding. Reviewing, updating, and consistently offering an effective onboarding process will ensure new members continue to understand and fulfill Board expectations.
- Board members review their expectations annually. Implementing an accountability tool, such as a score card, will remind Board members of their expectations throughout the year and help track their individual progress.
- Board candidates shadow a program during their onboarding. Adding an annual volunteer requirement for sitting Board members will ensure Board members stay connected to SHA's programs.

Growth and maturation have led to shifting Board roles and responsibilities.

SHA has grown and matured significantly since its founding in 2011, especially in the last few years as it added staff and increased its food distribution. Conversations with Board members and staff highlighted these changes led to shifting Board roles and responsibilities. The Board agreed to develop Board position descriptions and succession plans to clarify roles and responsibilities and promote Board stability.

Members are looking for opportunities to engage in Board service.

Interviews with Board members suggest that some members would like more direction and structure to support increased engagement. Strengthening communication and information sharing would ensure all Board members are well informed and also support their active participation in decision making. Returning to in-person meetings and scheduling other in-person events would also help Board members get to know each other, build relationships, and feel more engaged.



Recruitment could benefit from expanding beyond SHA’s current network of supporters.

Board members are often recruited from within the networks of current Board members. Expanding recruitment beyond these networks would broaden the lived experiences, perspectives, and networks on the Board. Therefore, SHA would benefit from reviewing and updating the Board’s recruitment processes to reach prospective members beyond its current network.

Based on the results of the Board Analysis, opportunities for SHA include:

- Supporting Board members to continue meeting expectations
- Consistently providing an effective onboarding
- Developing succession plans and pipelines for Board leadership
- Engaging Board members beyond meeting participation
- Expanding Board recruitment efforts

Leadership Transition

Nearing the conclusion of the strategic planning process, the Executive Director provided notice of her planned departure and a new individual was recruited to fill the Executive Director role. The new Executive Director has significant experience in both the nonprofit and food security sectors and participated in reviewing this plan with the Work Group and Board leadership.

While the environmental scan’s overarching findings and resulting goals remain unchanged, additional tactics have been added to ensure an effective leadership transition for the initial 12 to 18 months of the implementation period. Additionally, the implementation of some goals has been postponed by a year so that the Board is able to fully onboard a new chief executive and build a strong development team that will drive continued, sustainable growth.



Mission, Vision, and Values

During the strategic planning process, SHA reviewed and revised its mission and vision. The Work Group and Board also took this opportunity to review and make minor adjustments to staff-developed values. These statements are reflected on the first page of this plan.

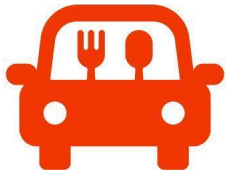
Big Bold Goal

As part of the strategic planning process, SHA also crafted a Big Bold Goal, included on the first page of this plan. Since not every strategic plan has a Big Bold Goal, a brief concept description is included:

The Big Bold Goal is an aspirational and ambitious goal that cannot be achieved during this three-year plan. In fact, this goal could take decades to achieve and serves as a guide to the organization's operations and programs until it is achieved. Additionally, the selection criteria for future volunteer and staff leadership will include commitment and ability to drive the organization toward this goal.

Additionally, a Big Bold Goal must have the following important elements:

- *Feel impossible to do right now*
- *Inspire staff, Board, and constituents*
- *Require creativity and innovation*
- *Be objectively measurable*



Three Year Strategic Priorities

Saturate metro-Atlanta so everyone has food security

- Implement a block-by-block strategy, iterating as necessary to ensure success
- Identify, develop, and iterate additional strategies as necessary to reach underserved areas of metro Atlanta
- Develop the internal infrastructure necessary to support saturation of food deserts in metro Atlanta

Bolster fundraising and marketing efforts

- Elevate SHA's brand in metro Atlanta
- Leverage fundraising opportunities by proactively engaging individual donors, corporate sponsors, and foundations

Enhance data and technology

- Implement commercially available technology that enables our community and talent to easily engage with our mission
- Develop data collection tools and processes that support marketing, fundraising, programs, and informed decision making

Become a talent magnet

- Ensure SHA has the organizational structure and staff necessary for continued growth and expansion
- Create the culture and framework to recognize talent and their impact on SHA's mission
- Intentionally incorporate JEDI values into everything SHA does

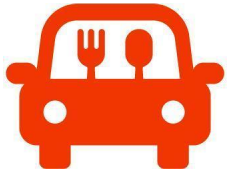
Fortify SHA's staff and Board leadership to drive sustainable, long-term growth

- Recruit, onboard, and support the next Executive Director
- Build a development team to grow philanthropic revenue
- Craft and maintain succession plans for key staff and Board leadership positions
- Support Board members to understand and meet all roles, responsibilities, and performance expectations

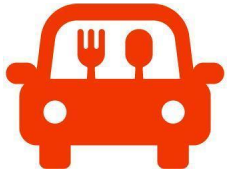


Annual Objectives

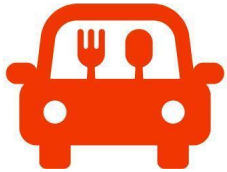
Strategic Priority	2023	2024	2025	2026
Saturate metro-Atlanta so everyone has food security	<p>Develop and implement a facility and space strategy</p> <p>Strengthen the quality and consistency of existing programs</p> <p>Prepare to implement Block by Block Pilot Program</p>	<p>Continue efforts to strengthen the quality and consistency of programs</p> <p>Implement Cobb County Block-by-Block Pilot Program</p> <p>Identify additional underserved communities in metro-Atlanta in collaboration with community partners</p> <p>Encourage current donors to increase their food donations</p>	<p>Evaluate Block-by-Block program and expand to two additional counties</p> <p>Host partner agency conference</p> <p>Evaluate staffing needs</p>	<p>Evaluate Block-by-Block program and expand to two additional counties</p> <p>Explore opportunities for expansion outside SHA's current footprint</p> <p>Evaluate staffing needs</p>
(Resources Needed)	<p>Staff & Board time</p> <p>Funding</p>	<p>Staff time</p> <p>Funding</p> <p>Food donors</p>	<p>Staff time</p> <p>Funding</p> <p>Food donors</p>	<p>Staff time</p> <p>Funding</p> <p>Food donors</p>



Strategic Priority	2023	2024	2025	2026
Bolster fundraising and marketing efforts	<p>Launch Development Director recruitment campaign</p> <p>Strengthen fundraising capacity</p> <p>Craft a development strategy</p>	<p>Craft a marketing strategy to support the development strategy</p> <p>Continue recruiting a marketing and development team</p>	<p>Evaluate marketing and development staff needs</p> <p>Determine Food for Thought's role in marketing and fundraising; Implement</p> <p>Define SHA's role in policy making and leveraging government resources to alleviate hunger</p> <p>Continue recruiting a marketing and development team</p>	<p>Evaluate marketing and development staffing needs</p> <p>Evaluate development and marketing strategies; modify as needed</p> <p>Continue recruiting a marketing and development team</p>
(Resources Needed)	<p>Staff time</p> <p>Funding</p> <p>Third party vendors</p>	<p>Staff time</p> <p>Funding</p> <p>Third party vendors</p>	<p>Staff time</p> <p>Funding</p> <p>Legal counsel</p>	<p>Staff time</p>
Enhance data and technology	<p>Understand technology needs and identify best solution</p>	<p>Create a master data management strategy</p> <p>Clean SHA's current data</p>	<p>Implement talent data education plan</p> <p>Work with Program Director to ensure data</p>	<p>Implement talent technology education plan</p>



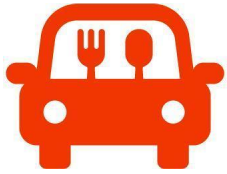
Strategic Priority	2023	2024	2025	2026
	Understand software needs	Develop plan and tools to educate talent on role of data and how they can support effective data tracking	and technology support programs Work with Development Director to ensure data and technology support marketing and fundraising efforts	Audit SHA's data and technology to identify new gaps
(Resources Needed)	Staff time	Staff time Funding	Staff time Funding	Staff time Funding
Become a talent magnet	Strengthen human resource function Launch Advisory Council Identify opportunities for Board and staff to strengthen relationships	Engage a fractional HR contractor Create formal compensation structure Create formal feedback channels Help all talent understand their role in SHA's impact Continue efforts to strengthen Board / staff relationship	Review and update all policies and procedures, including SOPs and playbooks Infuse professional and personal development into the People & Talent framework Create a staff leadership team Continue efforts to strengthen Board / staff relationship	Cross-train staff and volunteers to strengthen institutional knowledge Conduct JEDI assessment Continue efforts to strengthen Board / staff relationship



Strategic Priority	2023	2024	2025	2026
(Resources Needed)	Staff & Board time HR Platform	Staff & Board time FWA 2022 Study Compensation Analyst Benefits broker Funding	Staff & Board time HR Consultant Funding	Staff time JEDI consultant Funding
Fortify SHA's staff and Board leadership to drive sustainable, long-term growth	Continue intentional onboarding support for the Executive Director	Prepare succession plans for key staff and Board leadership positions Review and revise Board committee structure, including charters and annual goals Define and implement a Board recruitment strategy that reaches a diverse pool of candidates Craft and implement a Board onboarding strategy and playbook Review and redefine Board service expectations	Evaluate Board recruitment and onboarding; update as needed Increase Board size to 20	Evaluate Board performance expectations; update as needed Evaluate Board size; modify as needed



Strategic Priority	2023	2024	2025	2026
		Increase Board size to 17		
(Resources Needed)	Board time Funding Document templates	Board time Document templates	Board time Document templates	Board time

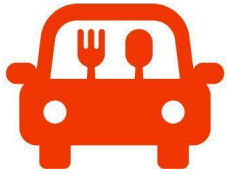


Year One Quarterly Tactics

Goal	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Lead
<p>Saturate metro-Atlanta so everyone has food security</p>	<p>Understand space needs and facility options □</p> <p>Map current network of agencies and food donors ◆</p>	<p>Identify and implement facility strategy □</p> <p>Develop Block-by-Block pilot framework ◆</p> <p>Recruit Block-by-Block volunteers ◆</p> <p>Draft new partner agency agreement and establish new onboarding and training process ◆</p> <p>Design and implement new volunteer</p>	<p>Conduct environmental scan to support service expansion policies ◆</p> <p>Draft impact metrics ◆</p> <p>Launch Block-by-Block pilot program ◆</p> <p>Implement new partner agency agreement and training ◆</p> <p>Work with partner organizations to collect data on</p>	<p>Develop partner agency standard operating procedures (SOP) ◆</p> <p>Develop annual training for partner agencies ◆</p> <p>Evaluate current partners' capacity to absorb additional donations ◆</p> <p>Identify strategies to support existing food donors to increase their donations ◆</p> <p>Share community data with partner organizations and</p>	<p>Evaluate existing communication channels with partner agencies and identify areas for improvement ◆</p> <p>Evaluate capacity to support additional agencies operating inside current footprint ◆</p> <p>Implement strategies to increase food donations ◆</p>	<p>Evaluate partner agencies using the SOP; identify resources to bridge gaps ◆</p> <p>Identify new agencies and donors operating inside current footprint; Prepare for 2025 launch ◆</p> <p>Craft new agency and donor engagement strategy ◆</p>	<p>Executive Director □</p> <p>Food Network Manager ◆</p>



Goal	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Lead
		onboarding and training process ♦ Update online marketing to drive volunteer funnel ♦	underserved communities ♦	determine how to move forward ♦			
Bolster fundraising and marketing efforts	Draft Development Director job description and recruitment strategy ☐ Clean and evaluate existing donor data ☐ Create a development dashboard ☐ Develop grant calendar ☐	Launch Development Director recruitment campaign ☐ Craft and implement a development strategy that emphasizes individual and corporate sponsor stewardship and retention ☐	Onboard Development Director ☐ Design presentation templates ☐ Develop a comprehensive marketing plan to increase public awareness and direct people to action ☐ Train staff, Board, and volunteers on brand messaging ☐	Evaluate Purpose Possible contract and renew if applicable ☐ Recruit and onboard Development Manager ☐	Recruit and onboard Special Events Coordinator ☐ Explore capital campaign opportunities ☐	Recruit and onboard a Marketing and Development Coordinator ☐	Executive Director ☐ Development Director ☐



Goal	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Lead
			Host a fundraising training for Board members ☐ Recruit and onboard an Office Manager ☐				
Enhance data and technology	Conduct a technology audit and needs assessment ☐ Research and select best technology options ☐	Engage stakeholders to understand technology needs ☐ Conduct software audit and needs assessment ☐ Research and select best software option; create an implementation plan ☐ Present technology plan to the Board	Conduct a data audit ☐	Create a master data management strategy ☐ Conduct software satisfaction survey ☐	Clean SHA's current data ☐ Create a repository with all critical data system information ☐	Craft plan and tools to educate staff on role of data and data tracking; prepare to launch in 2025 ☐	Operations Manager ☐



Goal	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Lead
		and staff; Implement ☐					
Become a talent magnet	Identify a comprehensive HR platform ☐	Launch HR platform and train staff ☐ Evaluate current employee satisfaction and identify opportunities for improvement ☐ Conduct staff leadership succession planning ☐ Research professional development options ☐ Develop 2024 organizational goals ☐	Conduct salary analysis ☐ Develop standardized onboarding process ☐ Develop and implement staff feedback process ☐ Develop 2024 personal development goals ☐	Develop a formal compensation policy and structure ☐ Review agency-level risk and insurance needs if necessary, ☐ Coordinate one Board and staff social event ★	Prepare staff for addition of new director positions ☐ Determine health insurance strategy if necessary ☐	Design and implement annual review process ☐ Craft talent appreciation plan for calendar year 2025 ☐ Coordinate one Board and staff social event ★	Board Chair ★ Executive Director ☐



Goal	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Lead
<p>Fortify SHA's staff and Board leadership to drive sustainable, long-term growth</p>	<p>Continue intentional onboarding support for the Executive Director *</p>	<p>Continue intentional onboarding support for the Executive Director *</p> <p>Draft succession plan templates □</p> <p>Review and revise committee structure with charters and annual goals ♦</p> <p>Recruit 3 to 4 new Board members ♦</p>	<p>Continue intentional onboarding support for the Executive Director *</p> <p>Identify Board and staff leadership positions requiring succession plans; support leadership to complete their succession plans ♦ □</p>	<p>Continue intentional onboarding support for the Executive Director *</p> <p>Review Board onboarding strategy and playbook ♦</p> <p>Review and clearly define Board performance expectations ♦</p>	<p>Continue intentional onboarding support for the Executive Director *</p> <p>Craft a Board recruitment strategy ♦</p>	<p>Continue intentional onboarding support for the Executive Director *</p> <p>Conduct annual review of succession plans and update as needed ♦ □</p> <p>Implement recruitment strategy; increase Board size to 17 ♦</p>	<p>Board Chair *</p> <p>Governance Chair ♦</p> <p>Executive Director □</p>



Staffing Plan

This staffing chart is for planning purposes only and is designed as a projection tool for the budgeting process, fundraising planning, and strategy discussions.

	Baseline (Jan '23)	Updated 2023	2024	2025	2026
Executive Director	1	1	1	1	1
Office Manager	0	0	1	1	1
Operations Director	0	0	0	1	1
Operations & Data Manager	1	1	1	0	0
Technology & Data Coordinator → Technology & Data Senior Specialist	0	0.67	1	1*	1
Warehouse & Fleet Manager	0	0	0	0.25	1
Warehouse & Fleet Coordinator	0	0	0.5	1	1
Staff Driver(s)	0.85	1	1	1	1
Programs Director	0	0	0	1	1
New Market Manager (Cobb)	0	0	0.5	1	1
New Market Coordinator	0	0	0	0.25	1.25
Food Network Manager → Programs Manager	1	1	1	1*	1
Food Network Coordinator	0	0	0	1	1
Food Rescue & Volunteer Coordinator → Volunteer Coordinator	1	1	1*	1	1
Operations Coordinator	1	1	0	0	0
Development Director	0	0	1	1	1
Development Manager	0	0	0.75	1	1
Development & Marketing Coordinator → Development Coordinator	1	1	1*	1	1
Donor Relations Coordinator	0	0	0	1	1
Operations & Communications Coordinator → Marketing & Communications Coordinator	1	1	1	1	1
Total FTE	6.85	7.67	10.75	16.5	18.25

**Denotes a title change*



Pro Forma

This Pro Forma is for planning purposes only and is not a Board-approved budget. The Pro Forma is designed as a projection tool to be used in the budgeting process, fundraising planning, and strategy discussions.

	2023 Board Approved	Updated 2023	2024	2025	2026
Revenue					
Fundraiser	\$ 155,000	\$ 155,000	\$ 475,000	\$ 275,000	\$ 530,000
Grants	\$ 450,000	\$ 500,000	\$ 550,000	\$ 800,000	\$ 800,000
Individual Donors	\$ 295,000	\$ 310,000	\$ 350,000	\$ 450,000	\$ 570,000
Earned Revenue	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000
Corporations	\$ 75,000	\$ 100,000	\$ 150,000	\$ 200,000	\$ 250,000
Total Revenue	\$ 1,025,000	\$ 1,115,000	\$ 1,575,000	\$ 1,775,000	\$ 2,200,000
Expenditures					
Employee Related Expenses	\$ 655,557	\$ 629,210	\$ 945,512	\$ 1,326,384	\$ 1,560,017
Volunteers	\$ 5,000	\$ 5,000	\$ 5,150	\$ 5,150	\$ 5,305
Direct Fundraising Expenses	\$ 25,000	\$ 25,000	\$ 105,600	\$ 40,000	\$ 116,160
Community Relations / Marketing	\$ 31,700	\$ 31,700	\$ 34,870	\$ 38,357	\$ 42,193
Office / Warehouse Operations	\$ 67,288	\$ 66,589	\$ 88,745	\$ 99,701	\$ 83,308
Vehicle Operating	\$ 64,372	\$ 64,372	\$ 30,501	\$ 31,879	\$ 25,753
Technology	\$ 37,246	\$ 37,246	\$ 44,615	\$ 49,338	\$ 51,337
Insurance	\$ 7,581	\$ 7,247	\$ 8,118	\$ 9,547	\$ 10,337
Depreciation	\$ 21,914	\$ 21,914	\$ 50,000	\$ 50,000	\$ 50,000
Dues and Fees	\$ 48,300	\$ 92,300	\$ 93,068	\$ 113,040	\$ 98,740
Miscellaneous	\$ 10,000	\$ 10,000	\$ 10,300	\$ 10,300	\$ 10,609
Total Expenditures	\$ 973,958	\$ 990,578	\$ 1,416,479	\$ 1,773,697	\$ 2,053,757
Net Revenue	\$ 51,042	\$ 124,422	\$ 158,521	\$ 1,303	\$ 146,243