



Gifts of Love Strategic Plan

**February 9, 2009
Prepared by Christiansen Consulting**



Gifts of Love

Families Helping Families

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Gifts of Love Summary of the Planning Process

Strategic Plan Executive Summary

Planning Overview

In July of 2008, the *Gifts of Love* began a strategic planning process, made possible by a grant from the Hartford Foundation for Public Giving. As background, for the last 20 years *Gifts of Love* has been committed to meeting the basic needs of working individuals and families, mostly in the Farmington Valley, who are experiencing a temporary financial crisis so they can maintain stability. In the last few years, *GoL* has evolved to a new level. It now has a strong development program and signature fundraising events. It has professionalized its Board and office operations. And it is recognized in the community as making a measurable difference in a cost effective way.

To build on these accomplishments and get to the next level, the Board committed to a strategic planning process to review *Gifts of Love's* mission, clarify priorities, and determine how best to focus and acquire resources for continued success.

In July and August, Christiansen Consulting collected/reviewed organization documents, met with the Executive Director and Board Chair several times, interviewed 10 key partners/ stakeholders and reviewed 11 staff/Board surveys. From this research, an *Organizational Assessment* and *Key Influencer Analysis* were developed, providing data about the organization and how it is perceived.

Based on this 360 degree scan, Christiansen Consultant made recommendations about priorities for the organization and the strategic planning process. This work provided the foundation for the planning process that included the following meetings:

- **August 26, 2008 Meeting with Board:** To introduce strategic planning, determine the planning approach and develop *GoL's* Theory of Change
- **October 14 Mini-Retreat with Board and Planning Committee:** To review the 360 degree organizational assessment, to discuss where *GoL* is today, and key future priorities
- **November Staff Meetings:** To develop operational plans and determine required resources
- **December 2, 2008 Mini Retreat with Board and Planning Committee:** To discuss proposed strategic priorities, key relationships to cultivate, the Board's role as ambassadors and primary messages
- **January 27, 2009 Meeting with Board:** To discuss future Board Governance work and review the draft plan
- **February 11, 2009 Meeting with Board and Planning Committee:** To present and make final plan revisions and acknowledge the work that has been done
- **March 2009 Board Meeting:** To approve the strategic plan and conduct a Board training

The document that follows is the synthesis of this work and is the roadmap to help *GoL* evolve to become more sustainable and achieve enhanced mission impact with focus on F/Y 2009-2011. The foundation of the plan centers around three Key Priority Goals:

- **Program Priority Goal I:** To enhance client outcomes and access to services for impact
- **Cultivation/Development Priority Goal II:** To enhance funding, donors, strategic partnerships and resource coordination for sustainability
- **People/Processes Goal III:** To enhance organizational/governance effectiveness and sustainability and support strategic priorities for impact and sustainability

GIFTS OF LOVE STRATEGIC PLANNING PROCESS SUMMARIZED

| PLAN GOALS | KEY QUESTIONS/ISSUES | KEY DECISIONS |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| I. MISSION/ PROGRAM: To enhance outcomes and access for impact | <ul style="list-style-type: none"> • What is <i>GoL</i>'s <u>mission/business</u>? • Should/can <i>GoL</i> expand program focus on enhancing <u>financial independence</u> or just maintain focus on basic needs? How can <i>GoL</i> show self sufficiency <u>outcomes/impact</u>? • What is <i>GoL</i>'s <u>geographic scope</u>? • What can <i>GoL</i> do with current resources? What <u>impact</u> would additional resources make possible? | <p>Mission Clarification:</p> <ul style="list-style-type: none"> • The word <u>temporary</u> was eliminated from the mission because of recent economic downturn and expanding client needs • Scope of service expands to Central CT <p>New Case Management Focus:</p> <ul style="list-style-type: none"> • Demonstrating <u>financial self sufficiency outcomes</u> was determined a priority. • To accomplish this will 1) Enhance intake info.; 2) Monitor outcomes of a pilot group; 3) Expand budget coaching; 4) Conduct needs assessment • Funding to expand <u>case management & food pantry</u> is required for more impact <p>Convening Regional Food Task Force</p> <ul style="list-style-type: none"> • To discuss enhanced integration |
| II. CULTIVATION/ DEVELOPMENT: To enhance funding, donors, strategic partnerships, and resource coordination for sustainability | <ul style="list-style-type: none"> • What <u>individual relationships</u> should <i>GoL</i> staff/Board focus on (considering its limited resources) to cultivate donors/funding? • What are <i>GoL</i>'s <u>niche, case for support</u>, key messages? Why should someone invest in <i>GoL</i> rather than another similar organization? • How can Board/staff be better ambassadors and cultivators? | <ul style="list-style-type: none"> • Case for Support: Helping working clients achieve financial independence (a hand up) in a cost effective way is <i>GoL</i>'s niche/case; • Key Messages: Board/staff can use to play an ambassador role • Brand: <i>GoL</i> is well known and should leverage its community name recognition • Events: Determined maintaining events is key • Individual Relations: Determined that 1-1 relations will be key going forward w/ focus on community groups, schools, churches, area businesses, resource partners and funders • Web Expansion: Determined web promotion of events/volunteer opportunities is the most efficient use of resources; provides strong ROI |
| III. PEOPLE/ PROCESSES: To enhance organizational/governance effectiveness and support strategic priorities for impact and sustainability | <p>Board Development</p> <ul style="list-style-type: none"> • What Board enhancements will support strategic priorities? | <ul style="list-style-type: none"> • Board Evaluation: Decided to review structure, committee/task forces, by-laws, composition, roles/responsibilities, composition and effectiveness over the next year. |
| | <p>Staff Development</p> <ul style="list-style-type: none"> • What staff roles and infrastructure are required for <i>GOL</i> to maintain, grow and support plan priorities? | <ul style="list-style-type: none"> • Staff Work Plans: Developed plans with goals, required resources and benchmarks • Outcome Evaluation: Determined that even without new resources, staff could pilot a simple enhanced outcome evaluation |
| | <p>Volunteer Development</p> <ul style="list-style-type: none"> • How can <i>GoL</i> enhance and build its already strong volunteer program? | <ul style="list-style-type: none"> • Budget Coach Expansion: Determined this program is the foundation to enhance financial independence outcomes • Volunteer Manual: Determined this will further professionalize their strong program |



Families Helping Families

2009 Strategic Planning Priorities

Vision

Gifts of Love will be known as the lead Greater Farmington Valley area agency helping working families in financial stress to achieve goals towards financial independence with dignity.

Mission

Gifts of Love helps meet the basic needs of individuals and families in Central Connecticut experiencing a financial crisis so that they can achieve and maintain self sufficiency. Our clients are hardworking people who simply can't make ends meet.

Priority of Priorities

To enhance client financial self sufficiency outcomes, generate sustainable funding, and form strategic partnerships to achieve mission impact and sustainability

Priority Goals

Goal I: Program Priority: To enhance client outcomes and access to services (for impact) by:

1. Maintaining core services
2. Identifying/measuring client self sufficiency outcomes
3. Expanding the budget coach program
4. Expanding food pantry capacity/coordination

Goal II: Cultivation/Development Priority: To enhance funding, donors, strategic partnerships and resource coordination (for sustainability) by:

1. Maintaining annual fundraising initiatives
2. Identifying strategic relationships and strategies to cultivate (consider key funders, referral partners, businesses and community groups)
3. Developing an annual plan to promote *GOL's* programs, events and basic needs

Goal III: People and Processes Priority: To enhance organizational and governance effectiveness and support strategic priorities (for sustainability and impact) by:

1. Maintaining a balanced budget and evaluate required policies/procedures
2. Evaluating Board governance and structure
3. Evaluating staff/volunteer roles
4. Evaluating technology needs



Gifts of Love Strategic Planning Framework: Goals and Strategies

| Program Priority | Cultivation/Development Priority | People /Processes Priority |
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| Goals | | |
| <p>Goal I: Program: To enhance client outcomes and access to services, while maintaining core program components:</p> | <p>Goal II Cultivation/Development: To enhance funding, donors, strategic partnerships and resource coordination</p> | <p>Goal III- People/Processes: To enhance effectiveness and sustainability and support strategic priorities:</p> |
| Maintaining Strategies | | |
| <p>1. Maintain Core Basic Services</p> <ul style="list-style-type: none"> ▪ Develop plan to maintain basic needs and resource referral program outcomes annually | <p>1. Maintain Annual Fundraising Initiatives</p> <ul style="list-style-type: none"> • Develop plan to continue fundraising initiatives and meet targets annually | <p>1. Maintain Budget/Resource Management</p> <ul style="list-style-type: none"> • Maintain a balanced budget and evaluate required structure/policies/proceed. annually |
| Getting To The Next Level Strategies | | |
| <p>2. Identify/Measure Outcomes (self sufficiency)</p> <ul style="list-style-type: none"> ▪ Client Self Sufficiency Planning Tool: Research/ develop by April 09 ▪ Case Manger: Explore funds to monitor client self sufficiency outcomes by June 09 ▪ Client Needs Assessment: Develop by Jan. 10; Use needs assessment to enhance access/resource/referrals by April 10 <p>3. Expand Budget Coach Program</p> <ul style="list-style-type: none"> ▪ Budget Coaches: Consider vehicles to recruit/train additional coaches by June 09 ▪ Integration: Consider who will receive expanded services by June 09 <p>4. Expand Food Pantry (Capacity/Coordination)</p> <ul style="list-style-type: none"> ▪ Food Collaborative Task Force: Convene to discuss coordination strategies by April 09; Explore food services expansion by May 09 ▪ Farms: Work to expand fresh food by June 09 | <p>2. Identify Strategic Relationships/Strategies:</p> <ul style="list-style-type: none"> ▪ Develop plan to cultivate key relationships by April 09 and annually that focuses on: <ol style="list-style-type: none"> a. Partners: Providing client support b. Community Groups: Simsbury schools, churches, newcomers, Chambers etc. c. Area Businesses: Old Avon Village, food stores, Farmington Valley businesses etc. <p>3. Promotion/Brand/Positioning</p> <ul style="list-style-type: none"> • Annual Plan: Develop/implement prioritized plan that includes media contacts, releases publications, ads, mailings etc. with focus on Web maintenance and E-blasts by June 09 and Jan. annually • Primary Messages/Assets: Develop messages/train Board, staff, and volunteers by Jan. annually; encourage to participate in one ambassador opportunity annually | <p>2. Evaluate Board Governance/Structure</p> <ul style="list-style-type: none"> • Structure/Composition: Evaluate needs to support strategic plan by June 09 & annually • Strategic Plan: Evaluate progress monthly <p>3. Evaluate Staff/Volunteer Structure</p> <p>Staff</p> <ul style="list-style-type: none"> ▪ Staff Work Plans: Complete annual plans to support outcomes by Jan. annually ▪ Expanded Staff: Explore funding to enhance case management and food pantry by Jan 10 <p>Volunteers</p> <ul style="list-style-type: none"> ▪ Volunteer Recruitment: Maintain/increase committed budget coaches and Operation Fuel volunteers annually ▪ Simsbury: Reach out to schools/other org. ▪ Volunteer Manual: Develop by Jan. 10 <p>4. Evaluate Technology Requirements</p> <ul style="list-style-type: none"> ▪ Intake Form: Determine needs to support outcome evaluation/fundraising by Oct. 09 |



Gifts of Love Strategic Planning Framework Continued: Outcomes and Required Resources

| Program Priority | Cultivation/Development Priority | People /Processes Priority |
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| Outcomes/Key Indicators | | |
| <p>1. Maintain Core Basic Services</p> <ul style="list-style-type: none"> ▪ Basic needs and resource/referral services and outcomes maintained <p>2. Identify/Measure Self Sufficiency Outcomes</p> <ul style="list-style-type: none"> ▪ Evaluation tool developed/ piloted ▪ Case manager funded/hired ▪ # client resource referrals increases/tracked ▪ % clients meet/exceed goals ▪ Needs assessment piloted/evaluated <p>3. Expand Budget Coach Program</p> <ul style="list-style-type: none"> ▪ # coaches recruited ▪ # clients complete course ▪ % trained clients who meet goals <p>4. Expand Food Pantry Capacity/Coordination</p> <ul style="list-style-type: none"> ▪ # days & lbs. more food available/family ▪ Collaborative task force ▪ Lbs. additional fresh food available | <p>1. Maintain Annual Fundraising Initiatives</p> <ul style="list-style-type: none"> • Annual plan developed; targets met <p>2. Identify Strategic Relationships/Strategies:</p> <ul style="list-style-type: none"> • Plan developed • # donors/\$ raised maintained/grows • Event attendance/\$ raised maintained/grows • # annual meetings and/or contact w/ partners • Support from schools, churches, newcomers, Chambers measured/increases • Support from Avon Village, food stores, Farmington Valley businesses grows <p>3. Promotion/Brand/Positioning</p> <ul style="list-style-type: none"> • Annual Plan developed and goals met • Web Page maintained • # Web promotion grows; impact evaluated • Key messages developed/Board trained • Each Board/staff participates in one ambassador opportunity annually | <p>1. Maintain Budget/Resource Management</p> <ul style="list-style-type: none"> • Balanced budget maintained • Structure/policies/procedures evaluated <p>2. Evaluate Board Governance/Structure</p> <ul style="list-style-type: none"> • Board governance evaluated • Monthly progress on plan evaluated <p>3. Evaluate Staff/Volunteer Structure</p> <p>Staff</p> <ul style="list-style-type: none"> ▪ Staff work plan goals achieved ▪ Case Manager hired <p>Volunteers</p> <ul style="list-style-type: none"> ▪ # Budget coaches/Operation Fuel volunteers ▪ # new organizations/people who volunteer ▪ Volunteer Manual complete <p>4. Evaluate Technology Requirements</p> <ul style="list-style-type: none"> • Intake Form developed and technology support in place |
| Required New Resources and Resource Allocation (to achieve plan goals) | | |
| <p>Dollars Required</p> <ul style="list-style-type: none"> ▪ \$ 20K Outcomes Case Manager ▪ \$ 60K Expanded food pantry space/staff/refrigerator ▪ \$ 5K Technology support ▪ \$2-5K Web page support/maintenance ▪ \$20 Van/food truck (with an in-kind or restricted donation) | <p>New Resource Allocation/Focus</p> <ul style="list-style-type: none"> ▪ Expanded intake process and client follow-up ▪ Expanded budget coach volunteers/leadership ▪ Meeting individually with key providers/partners ▪ Food Collaborative Task Force ▪ Expanded Board development and fundraising focus | |

Gifts of Love Operational Plan Executive Summary

Mission

Gifts of Love helps meet the basic needs of individuals and families in Central Connecticut who are experiencing a temporary financial crisis so that they can achieve/maintain self sufficiency.
Our clients are hardworking people who simply can't make ends meet.

Priority of Priorities

To enhance client outcomes, to generate sustainable funding, to form strategic partnerships to achieve mission

| Program Component | Goals | Priorities/Activities | Required Resources |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Program/ Office Management | <ul style="list-style-type: none"> Maintain individual client intake, contact w/ resource agencies, database management, banking, volunteer/ furniture schedules Develop client plans at intake; Monitor resource and referrals Visit other agencies | <p style="text-align: center;">Maintain</p> <ul style="list-style-type: none"> Office Management: Manage 300 clients, office, volun. sched., social workers, donations Eligibility: Determine client eligibility and refer those that do not qualify to other agencies Intake: Meet individually w/ all accepted clients Database: Maintain computer (fundraising, furniture inventory and client databases) Financial: Manage Banking—input checks, thank you letters, audit reports etc. Furniture: Coordinate pickup/delivery schedule <p style="text-align: center;">Getting To Next Level</p> <ul style="list-style-type: none"> Develop client plans at intake; Monitor R/R Visit other agencies Demonstrate self-sufficiency progress (A) | <p>Staff: 1 FT</p> <p>FY 09 Budget: *\$20K Case Mgr.(A) \$5K Technology(A)</p> |
| Pantry | <ul style="list-style-type: none"> Increase/Maintain inventory Secure walk-in refrig. (storage) Expand facility—for storage/ shelves Identify funds to buy foods store bargains | <p style="text-align: center;">Maintain</p> <ul style="list-style-type: none"> Weekly: assess gaps/needs; order/pickup food Daily: search internet/Foodshare for deals Regularly: Clean/maintain refrigerators Collaborate: share free items (Avon/ Torrington) <p style="text-align: center;">Getting To Next Level</p> <ul style="list-style-type: none"> Refrigerators: fund refrigerators (B) Pantry Expansion: expand facility(B) Cash: for food store bargain (FS food gaps) (C) | <p>Staff: 1 PT (20+)</p> <p>FY 09 Budget: \$60K expansion(B) \$ for food (C)</p> |
| Furniture | <ul style="list-style-type: none"> Fund new vehicle or van in fleet Enhance efficient coordination | <p style="text-align: center;">Maintain</p> <ul style="list-style-type: none"> Daily: Checks/respond to messages Weekly: Develop schedule, goes to Foodshare, pickup T/TH; deliver W <p style="text-align: center;">Getting To Next Level</p> <ul style="list-style-type: none"> New Vehicle: fund van or new truck(D) | <p>Staff: 25 hours PT Furniture staff manages schedule</p> <p>FY 09 Budget: \$ 20K (D)</p> |
| Volunteer Coordinator | <ul style="list-style-type: none"> Increase/maintain volunteers Reach out to schools/other org. in Simsbury Expand Budget Coaches Develop volunteer manual | <p style="text-align: center;">Maintain</p> <ul style="list-style-type: none"> Operation Fuel: Field calls to train volunteer Prospective Volunteers: Field inquiries— 2-4 appointments/week with potential volunteers Volunteer Gaps: Fill-in when needed Events Liaison: Help staff volunteer committee, run event auctions, field phone calls Monthly Outreach: to create awareness <p style="text-align: center;">Getting To Next Level</p> <ul style="list-style-type: none"> Budget Coaches: increase Operation Fuel: identify/train volunteer(s) Volunteer Manual: develop | <p>Staff: 1 PT Budget Coaches-BC & volunteer BC chair</p> <p>FY 09 Budget \$0K extra required</p> |

GIFTS OF LOVE ANNUAL PLAN

| Program Priority Goal I: To enhance client impact, responsiveness, and access to services, while maintaining core program components by: | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| Priority Area | Supporting Strategies and Activities | Objectives/ Indicators | Fall/Winter | Spring | Summer | Fall | Future |
| 1. Core Services: Maintain basic needs, R/R Services & Outcomes : : | Program/Office Management <ul style="list-style-type: none"> ◆ Maintain individual client intake, contact w/ resource agencies, database management, banking, volunteer/ furniture schedules | <ul style="list-style-type: none"> ◆ # Clients served ◆ # Volunteers and volunteer hours ◆ # donations ◆ Basic needs donations and client allocations tracked | <ul style="list-style-type: none"> ◆ Office Manager: Manage 300 client cases, office, vol. schedules, social workers, donations ◆ Eligibility: Assess/ refer non- qualifying ◆ Intake: Meet w/ all accepted clients ◆ Database: Maintain fundraising, furniture inventory & client databases ◆ Financial: manage Banking— input checks, letters, audit reports etc. ◆ Furniture: Coord. pickup/ delivery | <ul style="list-style-type: none"> ◆ Office Manager: Manage 300 client cases, office, vol. schedules, social workers, donations ◆ Eligibility: Assess/ refer non- qualifying ◆ Intake: Meet w/ all accepted clients ◆ Database: Maintain fundraising, furniture inventory & client databases ◆ Financial: manage Banking— input checks, letters, audit reports etc. ◆ Furniture: Coord. pickup/ delivery | <ul style="list-style-type: none"> ◆ Office Manager: Manage 300 client cases, office, vol. schedules, social workers, donations ◆ Eligibility: Assess/ refer non- qualifying ◆ Intake: Meet w/ all accepted clients ◆ Database: Maintain fundraising, furniture inventory & client databases ◆ Financial: manage Banking— input checks, letters, audit reports etc. ◆ Furniture: Coord. pickup/ delivery | <ul style="list-style-type: none"> ◆ Office Manager: Manages 300 clients, office, vol. schedules. social workers, donations ◆ Eligibility: Assess/ refer non-qualifying ◆ Intake: Meet w/ all accepted clients ◆ Database: Maintain fundraising, furniture inventory & client databases ◆ Financial: manage Banking— input checks, letters, audit reports etc. ◆ Furniture: Coord. pickup/ delivery | <ul style="list-style-type: none"> ◆ Evaluate Annual Plan |
| | Pantry <ul style="list-style-type: none"> ◆ Maintain inventory and schedule ◆ Continue working to maximize available food | <ul style="list-style-type: none"> ◆ # Bags food ◆ Do not run out of staples ◆ Facility maintained | <ul style="list-style-type: none"> ◆ Weekly: assess gaps/needs; order/pickup food ◆ Daily: search internet for deals ◆ Regularly: Clean/ maintain refrig. ◆ Collaborate: share free items (Avon/ Torrington) | <ul style="list-style-type: none"> ◆ Weekly: assess gaps/needs; order/pickup food ◆ Daily: search internet for deals ◆ Regularly: Clean/ maintain refrig. ◆ Collaborate: share free items (Avon/ Torrington) | <ul style="list-style-type: none"> ◆ Weekly: assess gaps/needs; order/pickup food ◆ Daily: search internet for deals ◆ Regularly: Clean/ maintain refrig. ◆ Collaborate: share free items (Avon/ Torrington) | <ul style="list-style-type: none"> ◆ Weekly: assess gaps/needs; order/pickup food ◆ Daily: search internet for deals ◆ Regularly: Clean/ maintain refrig. ◆ Collaborate: share free items (Avon/ Torrington) | <ul style="list-style-type: none"> ◆ Evaluate annual plan |
| | Furniture <ul style="list-style-type: none"> ◆ Maintain furniture pickup and delivery ◆ Enhance efficient coordination ◆ Continue to seek funding for a new vehicle ◆ Also includes Foodshare deliveries | <ul style="list-style-type: none"> ◆ \$ furniture picked up/delivered | <ul style="list-style-type: none"> ◆ Daily: Messages ◆ Weekly: Develop schedule, Food share, pickup Tue./ Thu.; deliver Wed. ◆ New Vehicle: fund van or new truck | <ul style="list-style-type: none"> ◆ Daily: Messages ◆ Weekly: Develop schedule, Food share, pickup Tue./ Thu.; deliver Wed. ◆ New Vehicle: fund van or new truck | <ul style="list-style-type: none"> ◆ Daily: Messages ◆ Weekly: Develop schedule, Food share, pickup Tue./ Thu.; deliver Wed. ◆ New Vehicle: fund van or new truck | <ul style="list-style-type: none"> ◆ Daily: Messages ◆ Weekly: Develop schedule, Food share, pickup Tue./ Thu.; deliver Wed. ◆ New Vehicle: fund van or new truck | <ul style="list-style-type: none"> ◆ Evaluate annual plan |

Program Priority Goal I continued

| Priority Area | Supporting Strategies and Activities | Objectives/ Indicators | Fall/Winter | Spring | Summer | Fall | Future |
|------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2. Outcomes Identify/measure self-sufficiency outcomes by: | <ul style="list-style-type: none"> ◆ Planning Tool: Research/develop client financial planning tool by April 09 ◆ Case Manager: Fund case manager to support/monitor client self-suff. outcomes by June 09 ◆ Needs Assessment: Develop/pilot needs assess. by Jan 10 ; Use needs assessment to enhance services by April 10 <p>Responsibility: Diana/Denise</p> | <ul style="list-style-type: none"> ◆ Evaluation tool developed ◆ Case manager funded/hired ◆ # client R/R increase/tracked ◆ % clients meet/exceed goals ◆ Needs assess. developed/eval. | <ul style="list-style-type: none"> ◆ Explore grant for case manager ◆ Research planning tools | <ul style="list-style-type: none"> ◆ Develop outcome & planning tool ◆ Interview case managers ◆ Evaluate intake form/process | <ul style="list-style-type: none"> ◆ Implement new intake form ◆ Hire case manager ◆ Implement outcome tool ◆ Choose client pilot group 10 clients/month | <ul style="list-style-type: none"> ◆ Develop client needs assessment ◆ Continue client enrollment | <ul style="list-style-type: none"> ◆ Implement needs assess. ◆ Continue client enrollment until reaches 50 ◆ Follow-up w/ clients every 6 months ◆ Evaluate outcome & intake forms annually |
| 3. Budget Coaches: Expand program by: | <ul style="list-style-type: none"> ◆ Recruitment: Consider vehicles to recruit/train additional coaches by June 09 ◆ Integration: Consider integration into core services—(who receives expanded service) by June 09 <p>Responsibility: Diana/Chris</p> | <ul style="list-style-type: none"> ◆ # coaches recruited; ◆ # clients trained ◆ % trained clients who meet goals | <ul style="list-style-type: none"> ◆ Contact Farm. Woods, Lyons, library Club & general business. for coaches and leadership board | <ul style="list-style-type: none"> ◆ Identify a new Board member w/ budget focus ◆ Develop training schedule | <ul style="list-style-type: none"> ◆ Implement training schedule | <ul style="list-style-type: none"> ◆ Implement training schedule ◆ Match clients | <ul style="list-style-type: none"> ◆ Evaluate/Implement training schedule ◆ Evaluate client outcomes & program annually |
| 4.. Food Pantry: Expand capacity, delivery, coordination by: | <ul style="list-style-type: none"> ◆ Food Coordination: Convene area Task Force to discuss coordination strategies by April 09 ◆ Expansion: Explore food services expansion by May 09 ◆ Fresh Foods; Explore expansion & coord. with farms by June 09 <p>Responsibility: Diana/Ron</p> | <ul style="list-style-type: none"> ◆ # days/lbs. food available/family ◆ Task Force/ Collaborative convened ◆ Lbs. more fresh food available | <ul style="list-style-type: none"> ◆ Write expansion grant to HFPG ◆ Explore attending New Britain Hunger Collab. | <ul style="list-style-type: none"> ◆ Convene Food Collab. TF ◆ Meet with farms | <ul style="list-style-type: none"> ◆ Meet with farms | <ul style="list-style-type: none"> ◆ Work with farm needs | <ul style="list-style-type: none"> ◆ Meet w. farms annually ◆ |

Cultivation/Fundraising Priority Goal II:

To enhance client impact, responsiveness, and access to services, while maintaining core program components by:

| Priority Area | Supporting Strategies and Activities | Objectives/ Indicators | Fall/Winter | Spring | Summer | Fall | Future |
|------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|----------------------------------------------------------------------------------------|--------------------------------------------------------------|--------------------------------------------------------------|--------------------------------------------------------------|-------------------------------------------------------------|
| 1. Maintain Annual Fundraising Initiatives Develop plan to continue fundraising initiatives and meet targets annually that includes: | Annual Events: ◆ Maintain fashion show, rocking chair or other events Responsibility: Diana/Board | ◆ # Events ◆ # Attendees ◆ \$ Raised | ◆ Events: Develop annual plan | ◆ Events: Implement annual plan | ◆ Events: Implement annual plan | ◆ Events: Implement annual plan | ◆ Events: Develop annual plan |
| | Annual Fund/Major Donors ◆ Complete 2 mailings ◆ Identify/Cultivate/ key donors ◆ Track trends Responsibility: Diana/Board | ◆ Targets met ◆ Key individual identified | ◆ Donor List: Develop key donor list ◆ Annual Fund: Evaluate response | ◆ | ◆ Annual Fund: Write annual fund letter | ◆ Annual Fund: Send out annual fund mailing | ◆ Annual Fund: Develop plan |
| | Annual Grants (foundations, local Govt., Corporations) ◆ Develop/implement calendar; ◆ Comply with requirements Responsibility: Diana | ◆ Annual calendar complete ◆ Requirements met ◆ \$ Maintain/increase | ◆ Grants Calendar Develop annual calendar | ◆ Grants Calendar Implement; meet requirements | ◆ Grants Calendar Implement; meet requirements | ◆ Grants Calendar Implement; meet requirements | ◆ Grants Calendar Develop annual calendar |
| 2. Identify Strategic Relations/ Strategies: Develop annual plan to cultivate key relations that focuses on: | Partners/Referral organizations ◆ Develop list of key partners ◆ Meet with them in 09 Responsibility: Diana/Denise | ◆ Partner list developed ◆ Meeting held | ◆ Partners: Develop list and meeting schedule | ◆ Partner Meetings: Develop list and meeting schedule | ◆ Partner Meetings: Develop list and meeting schedule | ◆ Partner Meetings: Develop list and meeting schedule | ◆ Partner Meetings: Update list and meeting schedule |
| | Community Groups: Sims. Schools Churches Newcomers, Chambers Other Responsibility: Diana/Staff/Board | ◆ Volunteers/ Support increase | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |
| | | ◆ Volunteers/ Support increase | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |
| | | ◆ Volunteers/ Support increase | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |
| | | ◆ Volunteers/ Support increase | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |
| | | ◆ Volunteers/ Support increase | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |
| | Area Businesses: Avon Village Food stores Farmington Valley Businesses Other Responsibility: Diana/Staff/Board | ◆ Support increases | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |
| | | ◆ Support increases | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |
| | | ◆ Support increases | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |
| | | ◆ Support increases | ◆ Develop key relations & plan | ◆ Implement plan | ◆ Implement plan | ◆ Implement plan | ◆ Evaluate plan and update |

Cultivation/Fundraising Priority Goal II Continued

| Priority Area | Supporting Strategies and Activities | Objectives/ Indicators | Fall/Winter | Spring | Summer | Fall | Future |
|-----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3.. Promote/ Brand/ Position: Develop/ Implement prioritized marketing and promotion plan and key messages: | <ul style="list-style-type: none"> Annual Mktg/Promo. Plan: Develop/implement prioritized plan that includes media contacts, releases, publications, ads, mailings etc. <u>with focus on Web maintenance and E-blasts by April and Jan annually</u> <p>Responsibility: Diana/Board</p> | <ul style="list-style-type: none"> ◆ Plan complete ◆ Plan meets goals ◆ Web promotion expands | <ul style="list-style-type: none"> ◆ Annual Plan: Develop ◆ Identify strategies to enhance Web promotion | <ul style="list-style-type: none"> ◆ Annual Plan: Implement | <ul style="list-style-type: none"> ◆ Annual Plan: Implement ◆ Web Promotion: Identify strategies to enhance | <ul style="list-style-type: none"> ◆ Annual Plan: Implement ◆ Web Promotion: Implement strategies to enhance | <ul style="list-style-type: none"> ◆ Annual Plan: Evaluate/Update/consider ROI |
| | <ul style="list-style-type: none"> Primary Messages/Assets: Develop/train Board, staff, and volunteers by Jan. annually Ambassador Opportunities: Determine annual Board/staff opportunities: fundraisers, community meetings, social events etc. <p>Responsibility: Diana/Staff/Board</p> | <ul style="list-style-type: none"> ✓ Primary message developed ✓ Board trained annually ◆ Board acts as ambassadors 1X annually | <ul style="list-style-type: none"> ✓ Messages: Develop primary messages ✓ Board: Train as ambassadors ◆ Ambassador Opportunities: Consider | <ul style="list-style-type: none"> ◆ Ambassador Opportunities: Consider | <ul style="list-style-type: none"> ◆ Ambassador Opportunities: Consider | <ul style="list-style-type: none"> ◆ Ambassador Opportunities: Consider | <ul style="list-style-type: none"> ◆ Messages: Review ◆ Board: Train Board ◆ Ambassador Opportunities: Determine annual |

**People/Processes Priority Goal III:
To enhance organization effectiveness and sustainability and support strategic priorities by:**

| Priority Area | Supporting Strategies and Activities | Objectives/ Indicators | Fall/Winter | Spring | Summer | Fall | Future |
|--------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Budget/ Resource Management Maintain balanced budget; evaluate Pol./Proced. | <ul style="list-style-type: none"> ◆ Budget: Develop by Jan annually; evaluate budget monthly ◆ Policies/Procedures: Review/ assure compliance annually ◆ Fiscal Year: Explore possibility of changing fiscal year by 2010 <p>Responsibility: Diana/Staff/Board</p> | <ul style="list-style-type: none"> ◆ Budget balanced ◆ Monthly budget reports to Board ◆ Policies/Procedures reviewed ◆ GoL complies with required laws/P/P | <ul style="list-style-type: none"> ◆ Budget: Monitor monthly ◆ Policies/Proced: Review/address issues | <ul style="list-style-type: none"> ◆ Budget: Monitor monthly ◆ Policies/Proced: Review/address issues ◆ F/Y: Consider F/Y change | <ul style="list-style-type: none"> ◆ Budget: Monitor monthly ◆ Policies/Proced: Review/address issues ◆ F/Y: Consider F/Y change | <ul style="list-style-type: none"> ◆ Budget: Monitor monthly ◆ Policies/Proced: Review/address issues ◆ F/Y: Recommend appropriate F/Y | <ul style="list-style-type: none"> ◆ Annual Budget: Develop/approve budget ◆ Policies/Proced: Review /address issues |
| 2. Governance: Evaluate required structure/ composition to support priorities: | <ul style="list-style-type: none"> ◆ Structure/Composition: Evaluate needs to support strategic plan by June 09 & annually ◆ Strategic Plan: Evaluate progress monthly <p>Responsibility: Diana/Board</p> | <ul style="list-style-type: none"> ◆ Governance evaluated ◆ 2 New members added annually ◆ Strategic plan monitored, goals achieved and plan updated | <ul style="list-style-type: none"> ✓ Roles: Clarify ✓ Strategic Plan: Review monthly ✓ Board Building: Nominate Board ◆ Training: Offer/ Governance & Board orientation | <ul style="list-style-type: none"> ◆ Structure: Evaluate governance ◆ Board Building: Develop list of potential Board ◆ Strategic Plan: Review monthly | <ul style="list-style-type: none"> ◆ Structure: Evaluate governance ◆ Board Building: Develop list of potential Board ◆ Strategic Plan: Do semi-annual plan assessment | <ul style="list-style-type: none"> ◆ Structure: Evaluate governance ◆ Board Building: Develop list of potential Board ◆ Strategic Plan: Review monthly | <ul style="list-style-type: none"> ◆ Effectiveness: Evaluate ◆ Strategic Plan: Evaluate/update ◆ Board Building: Expand list of potential Board ◆ Orientation: plan annual |
| 3. Staff/ Volunteer Structure: Evaluate required resources and structure to support strategic plan | <p>Staff</p> <ul style="list-style-type: none"> ▪ Staff Work Plans: Complete annual plans to support outcomes by Jan. annually ▪ Expanded Staff: Explore to support enhanced case mgmt. and food pantry by Jan 10 <p>Responsibility: Diana/Board</p> <p>Volunteers</p> <ul style="list-style-type: none"> ▪ Volunteer Recruitment: Maintain/increase committed budget coaches and Operation Fuel volunteers annually ▪ Simsbury: Reach out to schools/other org. ▪ Volunteer Manual: Develop by Jan. 10 <p>Responsibility: Diana/Chris</p> | <ul style="list-style-type: none"> ◆ Work plans complete ◆ Progress monitored; staff evaluated ◆ Funding for staff expansion secured | <ul style="list-style-type: none"> ◆ Work Plans: See program plans pages 9 & 10 | <ul style="list-style-type: none"> ◆ Work Plans: See program plans pages 9 & 10 | <ul style="list-style-type: none"> ◆ Work Plans: See program plans pages 9 & 10 | <ul style="list-style-type: none"> ◆ Work Plans: See program plans pages 9 & 10 | <ul style="list-style-type: none"> ◆ Goals: Set staff annual goals ◆ Work Plans: update plans ◆ Evaluations: completed |
| 4: Technology Evaluate requirements: | <ul style="list-style-type: none"> ◆ Intake Form: Determine requirements to support outcome evaluation/fundraising by Oct. 09 <p>Responsibility: Diana/Denise</p> | <ul style="list-style-type: none"> ◆ Intake form developed ◆ Technology to track outcomes in place | <ul style="list-style-type: none"> ◆ Technology: Evaluate needs to track outcomes | <ul style="list-style-type: none"> ◆ Technology: Evaluate needs to track outcomes/support fundraising | <ul style="list-style-type: none"> ◆ Technology: Evaluate/secure needs to track outcomes and fundraising | <ul style="list-style-type: none"> ◆ Technology: Evaluate/secure needs to track outcomes and fundraising | <ul style="list-style-type: none"> ◆ Technology: Evaluate/secure needs to track outcomes/support fundraising |