



FSD Best Practices: Advice for Partner Agencies on Organizational Planning

PLANNING

Develop both an annual strategic plan and 3-5 year long-term plans, and break these goals up into individual work plans. Involve community stakeholders and focus group feedback into your annual planning in a bottom-up approach to better understand client needs. Take staff on “learning journeys” to other agencies, businesses, or government offices to uncover new tactics.

Additional Advice

- **Involve staff and community in strategic planning, be responsive to community needs**
 - Take “learning journeys” to agencies you admire to learn and collaborate
 - Immerse your staff in the community to find out what the greatest needs are
 - Pass around journals for clients to fill out at distributions to gain their trust and hear their true opinions
- **Create a Mission Statement that defines the organization.**
 - A team should be assembled of no more than eight people. Typically this group consists of board members and primary staff. First you want to create a vision and a mission statement. A vision statement is a short one to two sentence statement that expresses where the business would like to be in the future. The mission statement should be a paragraph in length and should explain the values and intentions of the food pantry.
- **Set goals and objectives for the organization and review them every six months.**
 - Create a list of short term goals. For example the goals could include increasing employees, increasing fundraising efforts or moving into a larger building. Short term goals are those that can be accomplished within the first year or two of a five year strategic plan. Next create long term goals. These goals are to be met within a five year time period and can include implement new operational standards or purchasing a box truck. Long term goals can be implemented in phases. Set measurable goals.
- **Create a five year Strategic Plan**
 - Put your vision and mission statement, short and long term goals and the ways to meet these goals together along with a timeline. This information becomes your five year strategic plan.
- **Create a Business Plan to sustain the organization**
 - First, you need to describe your business and spell out the purpose of your business (Mission Statement). Next, describe the skills that are required to provide food for clients from ordering to distribution and who should have which skill sets, i.e. pantry staff, volunteers, board, etc. Then, you want to explain your service and analyze the costs associated with your organization. Provide demographics on your potential clients and service area. Next, describe how you

are going to market your organization. Estimate all costs and detail your yearly income and expenses.

- **Develop an annual budget**

- Determine the amount of money that your organization has received in the last year. This number will be used to represent your expenses that your organization has for planning purposes for coming year. Calculate your expenses for the past year for each category like diesel fuel, food, utilities or rent and add to these totals based on new initiatives and increased service. Take the total for each category and divide it by the number that you came up with that your organization made in the last year. Next, you need to forecast how much your organization can make in the upcoming year. Next, you need to budget for the upcoming business year.

- **Succession Planning**

- A succession plan is a tool designed to help organizations assess their short-term and long-term needs in key areas of expertise and describes the key responsibilities that a replacement person needs to know to function for the missing key staff person. A succession plan supports the training, career development and leadership capacity of existing employees while planning for current and future staff shortages. Focus on positions that directly support your organizational strategic or operational plan, such as the Executive Director position.