

# **Loaves & Fishes Family Kitchen**

## Strategic Plan FY2010-11

# Loaves & Fishes Family Kitchen - Strategic Plan

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# Loaves & Fishes Family Kitchen - Strategic Plan

## 1.0 Mission & Vision

- 1.1 **Mission:** Loaves & Fishes Family Kitchen is committed to providing no cost, hot nutritious meals and support services in a dignified, safe and caring environment. We provide services to all needy individuals. With special concern for families, senior citizens and the homeless.
  
- 1.2 **Vision:** Loaves & Fishes Family Kitchen is an organization that serves as many needy individuals as possible in a manner consistent with resources with a focus on geographical areas of greatest need within Santa Clara County.

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## 2.0 Strategic Objectives & S.W.O.T Analysis

### 2.1 Extend Services to Other Sites

- Current Situation: Loaves serves 62,000 meals annually at InnVision (Downtown San Jose) and Saint Maria Goretti (South East San Jose). Services include hot food and grocery bag programs.
  - ✓ Strengths: Well established operational processes and a stable workforce enable more effective deployment of services to alternate sites. Mission is easy to understand and services are a good fit for other organizations that desire to provide meals as an adjunct item. Loaves has a strong reputation for minimizing the amount of donor dollars spent on administration.
  - ✓ Weaknesses/Challenges: Additional funding and staffing, including a leadership type role, may be required to extend services. Migration of processes may distract staff, impact services, and reduce efficiency of operations.
  - ✓ Opportunities: There is a higher service need in downtown and eastside San Jose. Extending services will increase the profile of the organization and opportunities for expansion.
  - ✓ Threats: Community members may express concern regarding the presence of homeless guests in their neighborhoods. Alliance Partners may become a going concern and require Loaves to manage services outside the scope of their mission and core competencies. Lease commitments and permits (which are difficult to obtain) may be required.

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## 2.2 Expand the Donor Base and Diversify Funding

- Current Situation: Overall Donations have remained stable during the current year. The donor base has increased with giving from new individuals. Loaves has a loyal but aging individual donor base which has been primarily cultivated through relationships with the Catholic church. Loaves received a significant grant as a result of the economic stimulus package. Funding from Government grants has stayed the same for the current year.
  - ✓ Strengths: Donors remain loyal as demonstrated by stable year to year giving with the recent addition of younger donors. Established, reputable relationships with major government and private funders. Multi-year relationships with dedicated volunteers which, in many instances, evolve into financial donors. Successful history with the raffle event.
  - ✓ Weaknesses: Donor database (technology) is expensive to effectively maintain and requires additional clean up of dirty and outdated donor data. Services perceived by potential donors as a basic need rather than an enabler of self-sufficiency. The board has struggled with successful execution of fundraising event. There is no process in place to establish an endowment.
  - ✓ Opportunities: There are almost 2 million persons in Santa Clara whereas Loaves has only 5 thousand persons in the donor database. Aging donors provides the basis for a planned giving strategy. Collaborate with partners for fundraising.
  - ✓ Threats: Reduced government funding of non-profits has heightened competition for a share of the individual donor wallet. From time to time our corporate donors refocus their giving strategies to other needs.

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## 2.3 Community & Government Relations

- Current Situation: As a result of the Executive Director and Board out-reach efforts, Loaves has established strong relationships with city, county, and federal governments in an award winning manner. This includes outreach through television and radio. Board membership includes expertise which provides positive awareness and communication to the local community.
  - ✓ Strengths: Well respected by community and government. Board members have a wide range of skills, contacts and expertise.
  - ✓ Weaknesses: Reduced staffing levels limit access to grants that require higher levels of administrative compliance.
  - ✓ Opportunities: Expand relationship channels to community events (e.g., S.J. farmers market, Christmas in the park, S.J. jazz festival).
  - ✓ Threats: The focus of our corporate donors may change. Local government attitudes are subject to change and may become less welcoming to the mission. “Not in my backyard” perception regarding homeless guests.

## 2.4 Manage Operational Costs

- Current Situation: Loaves is financially stable and has cost effective operation processes by which it delivers services.
  - ✓ Strengths: Loaves currently has a balanced budget. Strong leadership by the Executive Director including hands on involvement of day-to-day operations has resulted in the “rightsizing” of staff and effective cost containment. There is funding for a new kitchen.

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- ✓ Weaknesses: Loaves services require an industrial kitchen and sufficient space for seating guests. There is currently no designated funding for permit costs that may be required when moving to an alternate location. Catholic Charities is in the process of permitting for their location. Availability of permits is very limited.
- ✓ Opportunities: Partnering can provide cost reductions through sharing of common administrative functions and procurement activity.
- ✓ Threats: Due to permitting and construction schedules, the date for extending services to Catholic Charities is not known with certainty. This event will drive a significant change in operation costs, including potential addition of staffing if services are maintained at existing sites.

## 2.5 Develop the Board

- Current Situation: Loaves has established a pro-active board with committees that contribute in a consistent, value added manner.
  - ✓ Strengths: Membership talent is diverse and includes leaders in the construction, business, labor, finance, legal, media and community. Many members have established relationships with influential community members and politicians. Advisory Board members contribute expertise and relationships to further the mission.
  - ✓ Weaknesses: Certain board members have exceeded their terms and may reduce the extent of their involvement in Board activities. Certain board members cannot fully participate in fundraising due to conflicts although their efforts and unique talents significantly contribute to the organization.
  - ✓ Opportunities: Board membership could be expanded to include food service/distribution and fund raising expertise. A retired politician could be considered (unless seen as a conflict).

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- ✓ Threats: Board members may be overcommitted or involved with other organizations or with their “day jobs.”

## 2.6 Cultivate Partnership Alliances

- Current Situation: Loaves has alliances with several non profits including InnVision, Catholic Charities, Second Harvest Food Bank, and Martha’s Kitchen.
  - ✓ Strengths: Current partnerships increase ability to provide meals and services consistent with the mission. Alliances are structured in a way that preserves independence as an organization.
  - ✓ Weaknesses: Loaves has limited ability to rely on sustained benefits from alliances since they may be informal and limited in scope.
  - ✓ Opportunities: Alliances may allow economies of scale, new donors, and ease access of services to guests. Government and corporate donors are more likely to contribute to organizations that have alliances.
  - ✓ Threats: Leases may not be renewed. Partners could undermine fund raising efforts through pursuit of the same donors. Loaves could become a takeover target.

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## 3.0 Strategic Initiatives

Ref	Strategic Initiatives (Tactical actions taken to achieve strategic objectives)	Owner	Timeline	
			1 to 3 Years	3 to 5 Years
<b>Extend Services to Other Sites (2.1)</b>				
3.1	Catholic Charities	Board/ED	Yes	Yes
3.2	InnVision through 2011 & 6 month Assessment post Move re: ability to financially sustain the move	Board/ED	Yes	Yes
3.3	St Maria Goretti through 2011 & 6 month Assessment post Move re: ability to financially sustain the move	Board/ED	Yes	Yes
<b>Expand the Donor Base and Diversify Funding (2.2)</b>				
3.4	Risk Appetite Budget Assessment, 6 month – 240K budget at 20K per month Increase	Board	Yes	
3.5	Raffle	Board	Yes	Yes
3.6	Board Driven Fundraising Event	Board	Yes	Yes
<b>Community &amp; Government Relations (2.3)</b>				
3.7	Newspapers, Radio, Online	Board	Yes	
3.8	Community Events	ED/staff/volunteers	Yes	
3.9	Newsletter	Board	Yes	Yes
<b>Manage Operational Costs (2.4)</b>				
3.10	Ongoing Cost Monitoring and Containment	ED	Yes	Yes
3.11	Volunteer Utilization	ED	Yes	Yes

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Ref	Strategic Initiatives (Tactical actions taken to achieve strategic objectives)	Owner	Timeline	
			1 to 3 Years	3 to 5 Years
3.12	In Kind Donations	ED	Yes	Yes
<b>Develop the Board (2.5)</b>				
3.13	Recruiting & Board Skill Set	Board	Yes	Yes
3.14	Leadership Succession Mentoring	Board	Yes	Yes
3.15	Risk Management (e.g., employment) & Policies/Procedures	Board/ED	Yes	Yes
<b>Cultivate Partnership Alliances (2.6)</b>				
3.16	Grocery Retail and Distribution	Board/ED	Yes	Yes
3.17	Corporate	Board/ED	Yes	Yes
3.18	Other Nonprofits	Board/ED	Yes	Yes

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## 4.0 Strategic Scorecard

**Legend:** **Green** = on track, no issues. **Yellow** = issues exist that may impact objective. **Red** = issues exist that require urgent attention and pose high risk to objective.

<b>Strategic Scorecard</b>	<b>Key Performance Indicator</b>	<b>Baseline</b>	<b>Target</b>	<b>Results</b>	<b>Status</b>	<b>Comments</b>
<b>Extend Services to Other Sites (2.1)</b>	# of new Sites	0	1	In process	<b>GREEN</b>	Catholic Charities permitting and construction in process.
<b>Expand the Donor Base and Diversify Funding (2.2)</b>	# of New Donors	\$5K	?	TBD FY10	<b>GREEN</b>	Discussed planned giving program with 80% of current donors. Need compelling call to action for endowment.
<b>Community &amp; Government Relations (2.3)</b>	# of Media Mentions	2 per year	4 per year	On Target	<b>GREEN</b>	Articles in Bus Journal and local publications regarding relocation and Commerce Award. Great & inspirational newsletter content.
<b>Manage Operational Costs (2.4)</b>	Budget to Actual	Spend within Budget	Spend within Budget	On Target	<b>GREEN</b>	Budget surplus for this quarter
<b>Develop the Board (2.5)</b>	# of net new board members	0	2 per Year	On Target	<b>GREEN</b>	Recent addition of new board members
<b>Cultivate Partnership Alliances (2.6)</b>	# of new partners	0	1 per year	On Target	<b>GREEN</b>	Inn Vision complete; Catholic Charities FY10

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## 5.0 Strategy Filter Criteria

- The following criteria are used to assess ideas and determine initiatives that align with Strategy (see Section 3.0 Strategic Initiatives).
  1. Impact on Current Programs
  2. Staff Time Requirements
  3. Ability to Promote What Loaves is About
  4. Is Someone Else Doing this or Can We do it
  5. Would it Supplement our Services
  6. Geographical Areas of Need
  7. Long Term Stability in Downtown San Jose
  8. Investment/Costs
  9. Staff Impact
  10. Increase Visibility to Our Community
  11. Supports Our Brand
  12. Identity to the Donor; Differentiation as to Competitors
  13. Autonomy as to Governance and Management
  14. Supports Direct Services
  15. “Not in My Back Yard”
  16. Level of Control e.g., Tenant vs. Ownership, Ability to Control Fate