



WHITE
PONY
EXPRESS



THE JOY OF GIVING

STRATEGIC PLAN | 2018



WHITE
PONY
EXPRESS

Our Guiding Principle – Unity

We honor the essential unity of all by making sure that no one suffers from want when there is a means of aiding them, embracing and serving all those in need.

Our Vision

To build on the generous nature of Americans so that a consciousness is born wherein it becomes natural for all to help one another. When that consciousness is widespread, there will be no more hunger-no more poverty.

Our Mission

To help eliminate hunger and poverty in Contra Costa County by delivering the abundance all around us to those in need.

Our Values

Selfless Service

We aid those in need cheerfully and lovingly without any thought of reward.

Appreciation

We want our volunteers, donors, and recipients to know they have clear pathways of communication, and to know they are valued and appreciated.

Collaboration

We recognize that through working together and listening to all - volunteers, recipients, and donors - we will arrive at better solutions than we could have found alone.

Respect

We demonstrate respect for all by following through on our mission, even when inconvenient to ourselves. We strive to be prompt, reliable, and timely in all we do.

All of us **taking care of** all of us

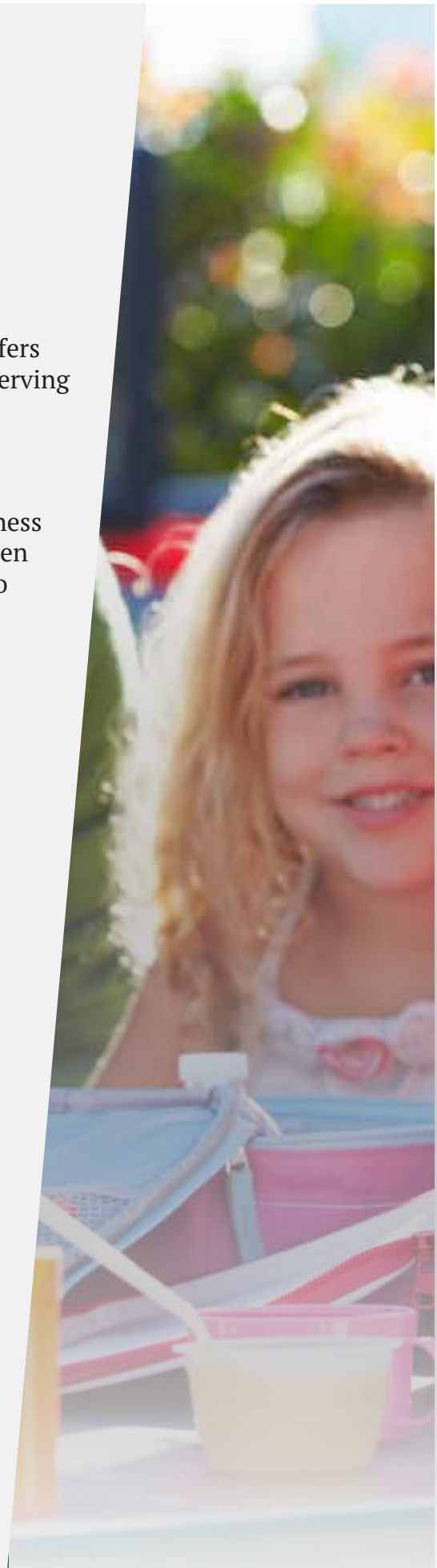




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THE JOY OF GIVING

EXECUTIVE SUMMARY 2018



White Pony Express begins the year with a full staff, a panoply of new assets to support growth, and a solid financial position. WPE has a very wide array of in-kind donors for both its Food Rescue and its Free General Store. We serve more recipient non-profits than we ever have before.

From this base, the board has established goals and strategies for 2018 in six areas: Service, Volunteers, Communications, Technology, Development, and Sustainability.

Service: The primary emphasis is on providing more food for the most vulnerable of the disadvantaged: children from very low-income homes, and seniors in low-income housing. This goal will be realized, in part, through a new School Pantry Program, which, over a 2-year period, is expected to end hunger and provide food parity for 10,000 people we are not reaching now. The second major goal is to provide more direct services to those without shelter, with the primary emphasis on operating a new Mobile Shower unit, which arrived in late January 2018. We expect this program to include clothing distribution supported by FGS program.

Volunteers: Volunteers are the body and soul of White Pony Express. We will use several means to recruit enough volunteers to fulfill our service programs, including corporate support and increased multi-generational participation. Along with active volunteer recruiting, we want to establish an ever-better experience for our volunteers to help them feel informed, connected, and well-trained.

Communications: In 2017, WPE established a dedicated and professional team of volunteers. This year, we will complete the re-branding process that was begun in late 2017. We also want to find effective, novel ways to communicate better with our volunteers and supporters.

Technology: Our first goal is to create an IT Strategic Plan with expert consultants, who will help us assess our needs and install the first elements of that plan. Another crucial area for improvement is finding a consultant who can help us identify the proper scheduling program for Food Rescue and its incredibly complex logistics. As a part of the overall plan, we will establish best practices.

Development: Due principally to hiring staff, our 2017 budget more than doubled from 2016. Our donors reached deep and covered these expenses, plus an amount for operating reserves. Our budget in 2018 is higher than our 2017 budget, so our primary goal is to meet these higher needs and continue to improve our operating reserve. In addition to stewardship and cultivation, we expect to experiment with creating new avenues of revenue, testing a variety of ways of reaching more willing donors.

Sustainability: As White Pony Express has become an established provider in our community, we have an obligation to ensure its long-term health. Two principal areas we will focus on are transferring our culture to an ever-growing and changing personnel pool, and transitioning from a legacy board to a community-based, engaged and activity board of directors.

We look forward to the opportunities and challenges that will come our way in 2018, along with the continuing support of our dedicated friends, and the new friends we will meet on the way.

Gary Conner
Executive Director
White Pony Express

2018-2021
WPE Giving Priorities

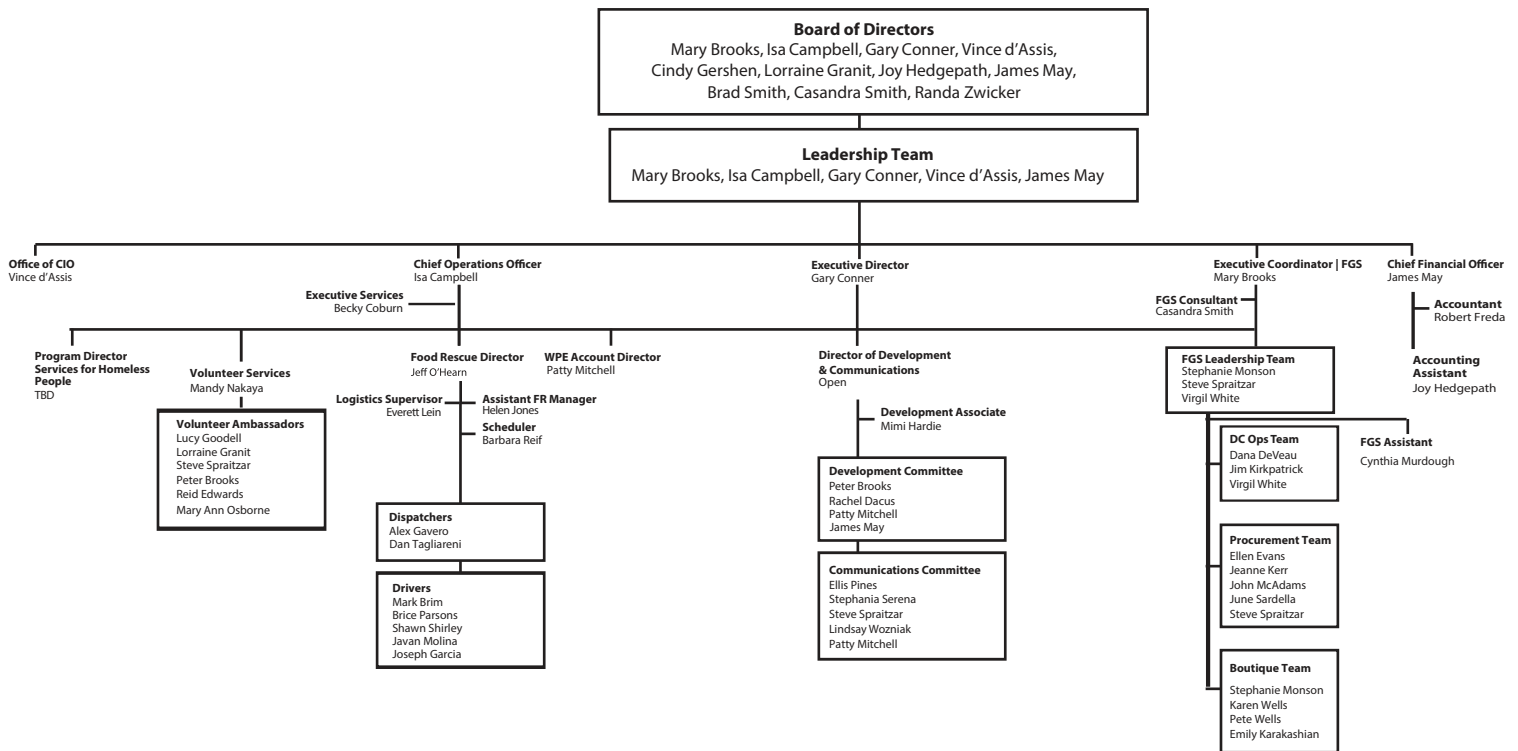
children, seniors,
veterans & those
without shelter



ORGANIZATION CHART

Below is our latest effort to provide a comprehensive representation of how White Pony Express is organized. We believe that the chart does a reasonable job of clearly delineating the basic structure. What we have not been able to do is simultaneously delineate how we function in practice.

White Pony Express is dedicated to a collaborative style of management so that, in practice, the organization is much less hierarchical than it may appear. For example, though we have an Executive Director and a Chief Operating Officer, major decisions are made collaboratively by the Leadership Team. Similarly, each program has its own leadership team, and each program is invited to bring difficult problems to the WPE Leadership Team so that together they can find the best path forward. Decisions that will have a significant effect on an area or team are made only after consulting with those who are most affected. We believe that decisions arrived at in this manner have a fuller “buy-in” from all concerned and that our plans are then owned most fully by all.



GOALS

1. Service

- a. Develop means to provide more food to the most vulnerable populations, especially children and seniors.
- b. Find more merchants to provide in-kind donations of new clothes, books and developmental toys to more people in need.
- c. Begin developing a direct service to the homeless program that will be initiated through the Mobile Showers Program.

2. Volunteers

- a. Recruit and retain sufficient volunteers to enable WPE to serve current and future clients.
- b. Improve multi-generational participation.

3. Communications

- a. Lower the percentage of volunteers on our annual survey who feel they did not receive enough information about WPE activities.
- b. Experiment with methods and frequencies to increase our audience and their engagement.

4. Technology

- a. Perform an assessment of needs in alignment with the strategic goals and growth of the organization.
- b. Create and adopt comprehensive technology plan.
- c. Establish best practices for the organization.

5. Development

- a. Raise enough money to meet 2018 budget in addition to adding \$250k to our reserve.
- b. Experiment with alternate sources of revenue for long-term financial security.

6. Sustainability and Longevity

- a. Ensure the long-term health and sustainability of the organization.
- b. Clarify ways to transfer culture of service throughout new organization structures and business models
- c. Transition from legacy to working board of director

STRATEGIES

1. Service

- a. Complete process re-engineering for the Food Rescue Program to create efficiencies
- b. Create a plan to identify and serve more schools and seniors in low-income housing.
- c. Identify businesses and partners who can donate clothing and toys to the Free General Store
- d. Find a location to provide recipient access to the mobile showers.

2. Volunteers

- a. Create volunteer tracking plan to determine numbers of volunteers recruited.
- b. Develop targeted recruiting. Identify civic, corporate, and school groups as volunteers in Food Rescue, as we have in Free General Store.
- c. Reduce barriers to volunteering.
- d. Improve new volunteer experience, including training.
- e. Experiment with a minimum of two techniques to increase multi-generational participation.

3. Communications

- a. Publish 4-6 email communications per year.
- b. Create internal newsletter/blog for volunteers.
- c. Fully implement new logo and brand rollout and complete process of updating marketing materials.
- d. Identify and publish the best channels of communication.
- e. Institute communication/marketing plan.

4. Technology

- a. Seek a consultant in a relevant field to oversee tech plan and conduct necessary research.
- b. Review research and collate findings across organization.
- c. Generate requirements focused on areas such as security, authoring, sharing and publishing.
- d. Budget stage and mapping requirements.
- e. Implementation phase.
- f. First round of best practices focuses on security.

5. Development

- a. Design and implement development plan with emphasis on stewardship and cultivation activities develop and expand a wider donor base.
- b. Improve board support for fund development.
- c. Start the process of developing a planned giving program.
- d. Expand base of foundation support.

6. Sustainability and Longevity

- a. Create a comprehensive succession plan to ensure the sustainability and longevity of White Pony Express.
- b. Development goals for all employees that include areas that reinforce White Pony Express culture and values.
- c. Actively recruit new board members to help with fundraising and special projects in their areas of expertise.

VISION CIRCLES

2018



Capabilities

Board, staff and volunteers have the capabilities, practices, and tools needed for execution on high quality performance

The "right" staffing and resources underwriting new projects and providing core foundational support

Responsive to the needs of stakeholders

Leadership, learning, and reflection = visioning & planning

Resources

Sustainable financial resources to support our vision, mission, and growth plans

Diverse, sustainable funding sources;

Innovative funding models

Collecting & communicating the measurable impact data that our partners and funders want

WPE BUDGET

2018

**White Pony Express
Budget
for the year ending December 31, 2018**

White Pony Express				
Draft Budget				
January 1 to December 31, 2018				
				Over
		2018	2017	(Under)
		<u>Budget</u>	<u>Actual</u>	<u>2017</u>
INCOME				
Cash Donations				
	Foundations, grants, nonprofits	1,200,000	912,473	287,527
	Individual	300,000	326,199	(26,199)
	Corporate Contributions	25,000	10,902	14,099
	Other organizations (clubs, etc.)	38,000	26,516	11,484
	Service fees & Other	<u>37,000</u>	<u>27,127</u>	<u>9,873</u>
	Total Cash Donations:	1,600,000	1,303,217	296,783
In-Kind Donations				
	Food Rescue	3,780,000	2,793,828	986,172
	Free General Store	1,000,000	800,291	199,709
	Professional fees and Vehicle use	<u>380,000</u>	<u>266,704</u>	<u>113,296</u>
	Total In-Kind Donations	5,160,000	3,860,823	1,299,177
	TOTAL INCOME	6,760,000	5,164,040	1,595,960
EXPENSES				
Administration Expenses				
	Professional fees (legal, etc)	1,000	957	43
	Accounting (Auditing)	12,000	9,500	2,500
	In Kind Professional Fees (IT, etc)	122,500	18,000	104,500
	General Liability Insurance	2,000	2,580	(580)
	Payroll & Related Costs	196,538	2,154	194,383
	Office rent	2,673	3,796	(1,123)
	Office Supplies, Shipping	4,400	4,418	(18)
	Utilities (tele, trash, PG&E)	1,000	921	79
	Computer expense	8,400	9,869	(1,469)
	Depreciation & Amortization	3,000	1,141	1,859
	Fundraising (resource devel)	60,000	24,421	35,579
	Advertising/Printing	37,200	7,212	29,988
	Website expense	1,200	190	1,010
	Licenses & Fees	1,200	7,407	(6,207)
	Seminars (continuing ed), Dues	5,000	435	4,565
	Bank and other processing fees	10,000	2,924	7,076
	Interest	-	356	(356)
	Government Agencies	160	160	-
	Community relations	1,200	1,214	(14)
	Merger	-	2,775	(2,775)
	Travel & Entertainment	<u>1,500</u>	<u>675</u>	<u>825</u>
	Total Administration Expenses:	470,971	101,107	369,864

				Over
		2018	2017	(Under)
		<u>Budget</u>	<u>Actual</u>	<u>2017</u>
Food Rescue Expenses				
	Professional fees (legal, etc)	-	9,000	(9,000)
	General Liability Insurance	4,000	-	4,000
	In Kind Professional Fees (IT, etc)	117,500	112,200	5,300
	Payroll & Related Costs	564,635	261,948	302,686
	Computer expense	-	891	(891)
	Auto insurance	24,000	22,259	1,741
	Distributed Food Value	3,780,000	2,763,828	1,016,172
	Furniture and Equipment	10,000	7,044	2,956
	Expendable supplies	18,000	16,931	1,069
	Fuel/Gasoline – mostly donated	30,000	27,842	2,158
	Maintenance, Repairs & Cleaning	60,000	59,352	648
	Distribution space rental	61,785	54,989	6,796
	License & Registration Fees	6,000	4,126	1,874
	Utilities	18,000	12,476	5,524
	Printing (flyers, promo materials)	300	306	(6)
	Uniforms	3,200	3,108	92
	Mileage/personal vehicles	18,000	16,744	1,256
	Grants/Donations	-	7,021	(7,021)
	Dispatcher	-	31,745	(31,745)
	Volunteer appreciation events	5,000	4,860	140
	Depreciation & Amortization	100,000	109,445	(9,445)
	Janitorial services	20,000	19,240	760
	Fundraising - resource devel	-	160	(160)
	Total Food Rescue Expenses:	<u>4,840,420</u>	<u>3,545,515</u>	<u>1,294,904</u>
Free General Store Expenses				
	Professional fees (legal, tax, etc)	-	2,350	(2,350)
	General Liability Insurance	2,000	3,935	(1,935)
	In Kind Professional Fees (IT, etc)	110,000	112,200	(2,200)
	Payroll & Related Costs	63,144	14,030	49,114
	Day labor	2,000	1,630	370
	Computer expense	-	50	(50)
	Distributed Goods	1,000,000	708,417	291,583
	Equipment	6,000	5,466	534
	Truck Rental	4,000	3,609	391
	Expendable supplies	10,000	10,689	(689)
	Program space rental	89,643	85,066	4,577
	Utilities	3,600	3,381	219
	Office supplies	4,000	3,959	41
	General Store Uniforms	3,000	-	3,000
	Printing (flyers, promo materials)	3,000	2,461	539
	Depreciation & Amortization	30,000	5,459	24,541
	Distribution space build-out	-	-	-
	Volunteer appreciation events	5,000	5,301	(301)
	Janitorial services	600	523	77
	Purchased goods	40,000	54,181	(14,181)
	Purchased goods - CWCP	50,000	50,633	(633)
	Grants (K.I.D.S./FD)	-	20,000	(20,000)
	Total Free General Store Expenses:	<u>1,425,987</u>	<u>1,093,340</u>	<u>332,647</u>

				Over
		2018	2017	(Under)
		<u>Budget</u>	<u>Actual</u>	<u>2017</u>
	Homeless Services			
	Housing	600	600	-
	Food	100	31	69
	Clothing	1,000	365	635
	Utilities	-	-	-
	Transportation	3,000	2,615	385
	Relocation Expenses	-	-	-
	Other	3,000	2,490	510
	Special Projects	<u>9,000</u>	<u>9,803</u>	<u>(803)</u>
	Total Homeless Services Expenses:	<u>16,700</u>	<u>15,903</u>	<u>797</u>
	Total Expense:	<u>6,754,077</u>	<u>4,755,866</u>	<u>1,998,212</u>
	Revenue less Expense	<u>5,923</u>	<u>408,175</u>	<u>(402,252)</u>
	Provision for Reserves			
	Expansion reserves	5,923	383,175	(377,252)
	Vehicle reserves	<u>-</u>	<u>25,000</u>	<u>(25,000)</u>
	Total Provision for Reserves:	<u>5,923</u>	<u>408,175</u>	<u>(402,252)</u>
	Change in Net Assets	<u>=</u>	<u>=</u>	<u>=</u>

BOARD AUTHORIZATION

WPE STRATEGIC PLAN 2018

<hr/> <i>Gary L. Conner, President</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Lorraine Granit, Secretary</i>	<hr/> <i>Date Signed</i>
<hr/> <i>James N. May, Treasurer</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Mary Brooks, Director</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Isa Campbell, Director</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Vince d'Assis, Director</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Cindy Gershen, Director</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Joy Hedgepath, Director</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Brad Smith, Director</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Casandra Smith, Director</i>	<hr/> <i>Date Signed</i>
<hr/> <i>Randa Zwicker, Director</i>	<hr/> <i>Date Signed</i>

APPENDICES

STRATEGIC PLAN 2018

Food Rescue 2018

Goal # 1 - Quality, Integrity and Mission-Focused Operations Strategy:

- Create and implement training for all Food Rescue staff and volunteers that assures we're focused on quality, safety and respect for each other and those we serve
- Increase communication and positive engagement with staff, volunteers, donors and recipients
- Create improved opportunities for people and organizations to participate

Goal #2 - Focus on serving priority populations

Strategy:

- Focus and prioritize recipient organizations that serve children and families through our School Pantry and other programs
- Additionally we will focus on low-income senior populations
- We will ensure all parts of the county are served with special emphasis on those most in need outside of Central County
- We will prioritize resources toward recipient organizations serving 50 or more people

Goal #3 - Stabilize and Build Team & Bench Strength

Strategy:

- Create resources to document processes
- Create training materials
- Create on-boarding training plans for all employees and Food Rescue volunteers
- Restructure scheduling; pick up and delivery logistics

Food Rescue 2018 Metrics

Restructure scheduling and operational logistics with the goals of:

- Increasing the # of people served through our recipient partners
- Increasing the average population size served per recipient
- Increasing the amount of food we pick up or receive from donors
- Maximizing current resources by increasing afternoon pick-ups and deliveries
- Reduce the number of variables in our operations that make it more difficult to scale and serve more of the existing need
- Create efficiencies in the current delivery system to increase poundage and the number of recipients per delivery
- Pilot at least two "School Pantry" programs in the county in the first six months of the year
- Add at least two Senior-focused recipient partner agencies

Free General Store 2018

Goals:

- Address management resource issues such as availability, accountability and succession planning.
- Develop a fit-to-purpose process by department for taking inventory.
- Create new channels to reach more people with broader needs.
- Build ongoing relationships with Free General Store recipients
- Work with new partners to provide goods to those in need.
- Communicate and report program's growth to all Stakeholders.
- Integrate White Pony Express rebranding.
- Create a budget that makes sense and supports Free General Store strategies.

Objectives:

- Develop a staffing plan
- Ensure organizational resources are assigned to Free General Store as needed.
- Develop and communicate volunteer assignments using approved system of record.
- Pro-actively manage the inventory.
- Support planned programs by determining the inventory needs for each program by inventory category.
- Determine & communicate gap analysis for each planned event.
- Determine the budget necessary to close the gap for each event.
- Develop plan for inventory purchases / replenishment & In-Kind donations.
- Improve the purchase tracking and reporting process
- Successfully coordinate with other White Pony Express programs and activities.
- Partner with other agencies to increase their ability to host events for the under-served members of our community.
- Negotiate with corporations to donate In-Kind inventory items.
- Improve Ring Central telephone implementation.
- Use website & social media effectively to support our programs.
- Create better tools for tracking & reporting distribution inventory.
- Use budget-to-actual financial reports to understand costs and better manage spending.

Development & Communications 2018

Goals:

1. Fundraising activities
 - A. Community Support Campaign (Annual Fund).
 - i. Support the current operating budget and provide additional funding to strengthen reserves.
 - ii. Pledge period for 2018 is: January 1, 2018 to December 31, 2018.
 - iii. Identify Constituencies Solicited.
 - iv. Gift Crediting Policy
 - v. Recognition program for Donors
 - vi. Recognition levels.
 - vii. Follow Community Support Campaign Timeline.
 - B. Launch of Donor Match Program.
 - C. Raffle and Other Development Fundraising Activities.
2. Cultivation & engagement (friend-raiser) Activities
 - A. Annual Picnic/Founder's Day.
 - B. WPE Hosted Reception for New and Existing Benefactors.
3. Planned giving and endowment growth
 - A. Educate constituents on alternative ways to support WPE with significant gifts to help to grow the endowment.
 - B. Assemble a team of professionals in law and finance to prepare for future WPE planned gifts and prepare marketing materials that promote planned giving.
4. Grantsmanship
 - A. Identify specific grants that can be approached to reach WPE needs.
5. Communications & Brand
 - A. Launch new website and update collateral materials
 - B. WPE brand resonates and clearly communicates vision and value proposition
 - C. Known and understood by all stakeholders in the ecosystem
 - D. Provides clear consistent communications
 - E. Personality spans all communications

Objectives:

1. Implement, monitor and update the current Development Plan for the following year.
2. Continue to educate the public of the special mission of WPE.
3. Strengthen the bonds between WPE and the local business community.
4. Raise Community Support Campaign gifts to fund operating budget.
5. Produce an external facing Annual Report.
6. Increase accuracy of donor/partners database.
7. Build a broader base of volunteer and financial support from constituents.
8. Involve the Board of Directors, Leadership Team and Development Committee in major donor prospect identification, cultivation and solicitation.
9. Develop strategies to achieve 100% of Board Members and staff participation in 2018 Community Support Campaign.
10. Increase foundation and corporate giving to WPE.
11. Implement basic planned giving program.

Volunteer Services 2018

Goal # 1 - Create a volunteer outreach team for sufficient recruitment of volunteers

- A. Streamline Food Rescue shifts to make volunteer training easier.
- B. Improve new volunteer orientation.
- C. Develop targeted recruiting.
- D. Use groups as volunteers in FR.
- E. Engage Communications Team to create videos and PowerPoint for orientation improvement in accordance with volunteer team requests: focus on school pantry programs, senior-focused food rescue distribution and other support, and homelessness.
 - Implement immediate training opportunities after orientation.
- F. 2-3 additional outreach team members to create job descriptions and assign jobs for the outreach ambassador team.
 - Focus on specific demographics (Stay at home Moms, unemployment offices, etc.).
- G. Maintain strong working relationship with current corporations and community partners and find new corporations and groups to volunteer.
 - Schedule at least 1 group per month to volunteer in FR.

Goal # 2 - Retain current (2018) volunteers by 65%

- A. Make signing up for shifts easier.
- B. Assign lead volunteer trainer.
- C. Recognition during volunteer shifts.
- D. Create a volunteer event team to carry out new activity based version of the circle cafe and the volunteer appreciation annual event.
- E. Increase communication with Volunteers.

Goal # 3 - Retain current (2018) volunteers by 65%

- A. Implement a calendar sign up online.
- B. Find a volunteer willing to do training and create job descriptions.
- C. Decide days and how to provide recognition for volunteers to create a strong community
 - Volunteer Appreciation Week (April).
- D. Develop job descriptions for event team and decide dates for:
 - Annual Appreciation Picnic.
 - Circle Café – transition to an activity based events - reduce to 2x per year.
- E. Implement announcement board in DC and online, and provide volunteers with contact list for different teams.



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