CCT Final Presentation to Open Table

June 4, 2018
Today’s Agenda

- Introductions and Overview
- Post Interim Focus
- Proposed Organizational Structure
- Key Roles and Responsibility
- Implications
- Implementation Plan
- Post project work on Organizational Design
Project Team

CCT Team

- Team Members
  - Cindy Greene
  - William Mrachek
  - Amy Roschelle
  - Cam Anh Tran
  - Steven Varney
  - Larry Werbeloff
- Project Managers
  - Nicole Gilmore
  - Jill Tsakiris
- Sponsor: Jay Paap

Client Team

- Executive Director
  - Jeanine Calabria
- Board Members
  - Deena Whitfield
  - Glenn Migliozzi
- Volunteer Management
  - Jean Husson
- Grant Team Coordinator
  - Jennifer Kelly
CCT will evaluate Open Table’s organizational structure and make recommendations as to how best to organize their volunteer and potential paid staff positions to be more sustainable and prepare for growth objectives.
Activities Summary

■ 20+ Interviews & Meetings
■ 4 Comparable Organizations Assessed
■ 200+ Volunteers Survey Responses
■ 50 Guest Survey Responses
■ 50+ Hours CCT Team Volunteered at OT
■ External Research / Literature Review
Organizational Design Process

1. Structure
   - work organization and management
   - key roles
   - accountability for outcomes

2. People
   - best use of resources
   - skillsets

3. Processes
   - work flow
   - decision making
   - collaboration

4. Control:
   - Metrics
   - Evaluation
   - Correction and rewards

OT with CCT: Organizational assessment and recommendations on structure and people

OT Management Post Project: Use CCT Interviews and survey responses, mgmt tools such as RACI provided in Appendix
The org chart represents what we believe is a way to organize the core functions of Open Table.

- Centralizes responsibility in 5 major areas
- Supports improved communication flow, accountability and resource management

What’s Different:

- Separated Facilities, Food Acquisition and Volunteer
- Suggest Fundraising be organized as a Committee reporting to Executive Director
Proposed Functional Org Structure

Board

Executive Director

- Fundraising
- Community outreach
- Sponsorship outreach

Facility and Operations

- Site Management
- Maintenance
- Transportation/Truck Management

Food Acquisition

- GBFB
- In-kind Donations
- Farms
- Food Drives

Guest Programs

- Guest Support/Services
- Pantry Management
- Dinner Management
- Mobile Pantry Management

Administrative

- Bookkeeping
- IT/Technology
- Marketing/Communications
- Events Management
- HR

Volunteer

- Volunteer Management
- Volunteer Outreach
## Paid and Contract Position Summary

<table>
<thead>
<tr>
<th>Organizational Unit</th>
<th>Paid</th>
<th>Contract</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities and Operations</td>
<td>Director</td>
<td>Specific facilities repair issues</td>
</tr>
<tr>
<td></td>
<td>Facilities Coordinator</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Food Assistance Driver</td>
<td></td>
</tr>
<tr>
<td>Food Acquisition</td>
<td>Director</td>
<td></td>
</tr>
<tr>
<td>Guest Programs</td>
<td>Director – Guest Programs</td>
<td>Social Worker *</td>
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<tr>
<td></td>
<td>Manager – Guest Support/Services*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Manager – Pantry</td>
<td></td>
</tr>
<tr>
<td>Administrative</td>
<td>Director **</td>
<td>Bookkeeper **</td>
</tr>
<tr>
<td></td>
<td>Bookkeeper **</td>
<td>IT Application /Maint Support</td>
</tr>
<tr>
<td>Volunteers</td>
<td>Director</td>
<td></td>
</tr>
</tbody>
</table>

* If the Guest Support/Services Manager also held a BSW or a MSW, the position might be able to handle a limited case load and therefore, avoid the need, at least initially, for contracting for a Social Worker resource.

** If the Administrative Director had accounting experience, it may be possible to incorporate the bookkeeping activities, at least initially, into the Director position, and possibly avoid the need for a paid employee or a contractor.
### Hiring Must Be Prioritized; Dependent on Funding

<table>
<thead>
<tr>
<th>Immediate</th>
<th>Near Term</th>
<th>Longer Term</th>
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<tbody>
<tr>
<td>Food Acquisition Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilities &amp; Operations Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Driver/Stocker</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pantry Manager</td>
<td></td>
<td></td>
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<tr>
<td>Guest Programs Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bookkeeper</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer Management</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Scenario Staff Meeting

- Rule of 7 - Resist inviting everyone.
- Executive Director + 5 or 6
- Consider “Stand-ins” for Directors not yet hired
  - Rotate based on topic, desire, availability
  - Ability/willingness to represent areas outside their own
  - Greatest need for cross-functional communication
  - Leadership development, succession planning
Examples

- Postal Workers Food Drive
- SOS food preparation
- Transportation of guests
Implications

- Personnel (Volunteer/paid staff)
  - Long standing volunteers may feel under appreciated/become disenfranchised
  - Clearer reporting and management structure leads to more efficient processes/less manpower needed to accomplish same amount of or even more tasks

- Guests
  - Better experience
  - Additional services
  - More time understanding guest preferences

- Financial
  - Additional employees means higher risk due to additional payroll expense
  - Consider tracking performance metrics to time growth. i.e. operating cost/guest served (pantry visits and meals delivered), salaries/cash contributions.

- Organization
  - Improved structure, management and processes will enable organization to pursue additional initiatives
  - Need tight coordination between Pantry and Food Acquisition
Rollout Plan Considerations

- Meet with the Board to determine timing and budget approval
- Determine if fundraising should take place to support new expense impact
- Develop internal communications strategy
- Develop hiring process and identify potential candidates
Communication With Volunteers Critical To Success

- Get buy in on strategic rationale
  - Meet with staff to present strategic outlook and communicate how new structure supports the strategic outlook
- Develop inclusive process for hiring
  - Open the process to volunteer candidates
  - Consider how to enable input from relevant volunteers in hiring
- Involve and empower volunteers in training new hire
- Develop guiding principles for how organization will operate
  - E.g., Paid people can’t be backstop for everything
- Communicate, communicate, communicate
Appendix

A. CCT Background
B. Materials from Interim Presentation
C. Key Roles Job Descriptions
D. Salary Related Surveys and Examples
E. Volunteer Survey
F. Guest Survey
G. Additional Tools and Resources
A. CCT Background
Community Consulting Teams of Boston (CCT) amplifies the impact of Boston-area nonprofits through pro bono management consulting projects performed by teams of experienced MBAs from top-tier business schools.

Since 1990, CCT has helped over 170 Boston-area nonprofits using more than 700 alumni volunteers to clarify their mission, evaluate new service opportunities, create effective marketing approaches, and improve the efficiency of their operations.

CCT is a 501 (c) (3) nonprofit organization.
B. Materials From Interim Presentation
## Summary/Key Findings - SWOT Analysis

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Weaknesses</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>■ Attractive, dependable source of food</td>
<td>■ Hasn’t transitioned to being a “larger” organization. Needs:</td>
</tr>
<tr>
<td>■ Good reputation in community</td>
<td>- Better processes, efficiency</td>
</tr>
<tr>
<td>■ History of high quality programs</td>
<td>- IT improvement</td>
</tr>
<tr>
<td>■ Amazing volunteers (HIGH Satisfaction)</td>
<td>- Updated Strategic Plan</td>
</tr>
<tr>
<td>■ Fundraising Prospective</td>
<td>- Goals and metrics</td>
</tr>
<tr>
<td>■ Partners and Sponsors</td>
<td>■ Vetting process for new ideas</td>
</tr>
<tr>
<td>■ Open minded leadership</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Opportunities</strong></th>
<th><strong>Threats</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>■ Potential to expand</td>
<td>■ Volunteer burnout / morale</td>
</tr>
<tr>
<td>- Reach new clients</td>
<td>■ No succession plans</td>
</tr>
<tr>
<td>- Offer new services</td>
<td>■ Guests prefer different way of obtaining food</td>
</tr>
<tr>
<td>■ Operating efficiencies</td>
<td>■ Maynard withdraws permit</td>
</tr>
<tr>
<td>■ Internal Communication</td>
<td>■ Those in need can’t all get to OT</td>
</tr>
<tr>
<td>■ Partner with other pantries/non-profits</td>
<td>■ Lack of secondary recurring revenue sources</td>
</tr>
</tbody>
</table>
ORG Design/SWOT Considerations

- Maintain/Capitalize on **Strengths:**
  - Volunteer engagement
  - Social Responsibility - we’re doing this for the mission
  - Focus on and respect for Guest needs
  - Openness to try new things

- Address these **Weaknesses:**
  - Leadership overwork - some jobs too big
  - Lack of goal clarity and alignment

- Increase readiness to take on these **Opportunities:**
  - More Pantry Hours
  - Mobile Pantry
  - New Programming (i.e. Wellness/Nutrition workshops)

- Mitigate these **Threats:**
  - More adept at handling disruptors (pantry inventory, weather, volunteer numbers,...)
  - Changes to finances (mix and timing of funding and onboarding paid staff)
  - Unexpected turnover

The following structure organizes OT workflows based on a grouping of activities that directly touch the client, that indirectly support client engagements, and those that are more administrative but critical to organization success.
Other Key Findings

- **Organizational Structure & Paid Staff Considerations**
  - Executive Director has too many direct reports
  - Current “Director” roles are too large for volunteers
  - Comparable Orgs not as flat and employ paid staff

- **Operations**
  - Guest & Volunteer Experience (Pantry)
  - Internal best practices - Site Management Team
Considerations
Paid V. Volunteer Staff Roles

In General, the following thoughts guide our recommendations:

- Volunteer time commitments for a position approach 20 hours a week
- Position requires more hours per day, days per week than volunteer can typically manage (2 hr shift/day, 3 shifts/week insert best practice)
- Position requires skills that volunteers don’t have
- Position involves work that is dangerous, dirty, dull
- Position’s duties cannot be disrupted, postponed
- Positions that require “context, continuity and commitment”
- PT or FT paid personnel need to report to other paid positions
  - Temp, outsourced, contracted, non-salary jobs may report to volunteer managers

Other More specific considerations include:

Comparable Organizations Research
Interviews

- Interviewed to date:
  a. GBFB Capacity Team (Alison Bradley, Katherine Walker, Mariko Sugimori) - Onsite Visit
  b. Julie LaFontaine, ED Open Door (Gloucester)
  c. Sharon Castelli, CEO Chrysalis / Freshplace (Hartford)
  d. Lyndsey Haight, ED Our Neighbors’ Table (Amesbury) - Onsite Visit
Interviews / Observations

- Greater Boston Food Bank (Capacity Team) - on site meeting
  a. Need for adequate planning before making any significant change in services provided
e.g. Weymouth lost their pantry space and transitioned over several months to mobile food pantry model
  b. Cross dock facility in Framingham - OT could take advantage with new truck / driver; reduce the need for trips
to Boston; same food availability apart from mini-marketplace only in Boston
  c. OASIS used by GBFB for distribution support; they do not care which CRM system is used by OT
  d. One meal a day is a goal but not a metric used by GBFB to rate agencies
  e. Collaboration between agencies increasingly a best practice, especially for social services; also cited Quincy
which shares a driver with another agency
  f. Suggested “term limits” to deal with volunteers who do not want to give up their roles to others
  g. Suggested use of groups of volunteers to deal with seasonal peak loads e.g. Quincy agency
  h. Encourage limiting growth in short run to achieve stability before expanding coverage and services
  i. Provided us GBFB best practice guides for starting a pantry, volunteer management and succession planning.
Interviews / Observations

- **Open Door (Gloucester)**
  a. Started 15 years ago with 6 FTE paid staff - PT ED, FT managers for meals, pantry and thrift store, FT truck driver, PT bookkeeper, FT HR manager
  b. Now 45 paid staff - split off jobs with PT staff first becoming FT as needed later
  c. One FT volunteer coordinator across all programs: 2 pantries, 13 mobile sites, thrift store, summer and community meals programs,
  d. Nutrition partnering with other orgs (prep in kitchen, go out to other locations), and nutritional education
  e. Volunteers always considered for new paid positions but consider org needs first
  f. Communication / including volunteers / team in organizational change process from the beginning is important
  g. Pantry: some warehouse staff, a pantry manager, food acquisition person who supervises distribution programs; 7-8 volunteers only per shift: sorting, prep food rescue food, weighing food and checking out
  h. 2 hours is a good shift for most of programs; tell people to leave when 2 hour shift done
  i. Use a cleaning company; have an in-house facilities manager also (replaced contractor used for 3 years)
  j. Vigorous cross training among distribution programs; team mentality support backup
  k. Director of Operations allowed ED to have 4 reports rather than 17 six years ago
  l. Get rid of unhappy volunteers; much better off forcing them out
  m. Organization is much better off with paid staff than before
  n. Need clear metrics in job descriptions
Interviews / Observations

- Freshplace / Chrysalis (Hartford)
  a. Consciously adopted a model limiting choice pantry services to 100 members (and their families) a year
  b. Their model maximizes impact in terms of transitioning people from food insecurity to security over 15-18 month membership period; set goals and measure progress; 30 minute interviews with program manager each month in enclosed office; validated by 3 year academic study
  c. Chrysalis provides employment services as well; low income families with no members over 63
  d. Open 6 days a week for 7 hours, including evenings and weekends; 25 - 40 members a week shop in pantry
  e. Leverage Chrysalis paid staff (development, volunteer management, HR) plus one FT paid Program Manager for the Freshplace pantry
  f. Food from Foodshare (pay) and Whole Foods (donate) each week - not ordered except for lettuce; they also grow own food in gardens and hydroponic facility
  g. Volunteers scheduled to pick up food from other sources as well
  h. Only need 4 - 10 volunteers a day for pantry operations; one volunteer accompanies each family as they shop
  i. Volunteer coordinator uses software program to schedule 500 volunteers across Chrysalis programs.
  j. Use United Way program to determine eligible benefits for members
Interviews / Observations

- **Our Neighbors’ Table (Amesbury) - on site meeting**
  
  a. Developed initial 3 year strategic plan in 2011 which defined their values: “provide food with dignity”; executed against it achieving all goals, including obtaining new facility and hiring initial staff.
  
  b. Executing against third strategic plan now through 2020: strict management of annual budgets
  
  c. Now up to 10 paid staff: Development Manager, Office Manager and Program Manager under ED.
  
  d. Program Manager over Mobile Market Manager, Market Manager, Meal Coordinator and Warehouse Manager
  
  e. ED: impossible to run and grow their operations with volunteers only; needed planned investments
  
  f. Change management needs to come from the top down based on declared values and shared Board vision; Board changed to support their growth; engaged all parties, including town and guests in strategic planning
  
  g. Job descriptions for all staff with annual goals for each; first performance evaluation cycle about to begin,
  
  h. Committee structures allow volunteers and staff to participate
  
  i. Some volunteers have 3 shifts a week: manage them closely; only if they are having joyful experiences still
  
  j. Backup of staff and some volunteers is still an issue that has to be continually managed
  
  k. Run 3-4 orientations a month for volunteers; Boomerang database plus Signup.com for visible slot scheduling; do not create jobs for volunteers under any circumstances; Saturday is critical day for them
  
  l. Pay for IT support as well as PT bookkeeper; also cleaning services
  
  m. ED takes lead justifying paid staff and budgets to the board - rest of organization is fully supportive now.
  
  n. ED has MSW; regrets did not hire additional person with Social Services background
Best Practices / Potential Recommendations

- Reduce number of people reporting directly to Executive Director
  - New FT paid Program Manager over Meals, Pantry, Guest Services and Mobile (future)

- Force backup for volunteer positions, especially supervisory positions
  - Different people on different days for each shift
  - Shadowing for limited time, then not allow on site when not scheduled shift
  - Not allow people to stay after their shift is over
  - Term limits for supervisory volunteer positions

- Extend pantry hours to lunch times and Saturdays
  - Accommodate more families that work during the day

- More use of groups to meet seasonal workload peaks

- Split off new PT paid positions initially and grow them to FT over time
  - Consider volunteers for paid positions as long as they meet job description requirements
  - Communicate need for paid staff positions to all volunteer supervisors

- Require extensive planning before introducing new programs or services
  - Where desirable, stabilize current operations first
  - Develop new strategic plan, operating budgets and implementation plans for new programs or services
Best Practices / Potential Recommendations

● Schedule guest social services appointments in private space
  ○ If recurring appointments, opportunity to set goals and track achievement towards food security

● Explore collaboration and possible cost sharing with other agencies
  ○ Share truck
  ○ Share paid social services support
  ○ Share nutrition support services, although people from affluent neighborhoods often know what they need

● Reduce number of families shopping in pantry at a time
  ○ So they are less rushed, more like supermarket shopping and, if needed, can be educated better on healthy food choices
  ○ Ideally, expand pantry space so that people can shop at their leisure with fewer restrictions

● Future mobile market needs to be planned and managed as new program
  ○ Provides opportunity for collaboration with other organizations e.g. senior homes
Thinking on Paid and Volunteer Positions

• Budget – is there a salary budget? If not, is it the intention to create one? What criteria will be used to establish this budget? Will there be any conditions or limitations placed on this salary budget? Have all the state and Federal employer tax obligations been included?
• Full time vs part time – what factors to be used in determining whether a position is full or part-time?
• Compensation philosophy – how does OT feel about pay equity, i.e., is the intention to have the ED the top paid person (hourly rate basis)?
• Job level considerations – any reservation with non-paid positions at the same level of a paid position?
• Job market considerations – any thoughts about full-time positions not having the same flexibility in salary decisions that a part-time positions allow for, i.e., the market will likely dictate the salary range for FT positions regardless of OT’s desire
Thinking on Paid and Volunteer Positions

• Managing turnover – the implementation of some Volunteer positions being paid vs some Volunteer positions not being paid will possibly result in turnover; is OT prepared to manage this?
• Bonus vs salary – any thoughts about a bonus compensation policy vs salary or a mix?
<table>
<thead>
<tr>
<th>OT members</th>
<th>role</th>
<th>Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deena Whitfield</td>
<td>co-chair of board</td>
<td>y</td>
</tr>
<tr>
<td>Sylvia Cullington</td>
<td>Board Member - treasurer</td>
<td>y</td>
</tr>
<tr>
<td>Glen Migliozzi</td>
<td>Board Member</td>
<td>y</td>
</tr>
<tr>
<td>Pam Gardner</td>
<td>sourcing/acquisition pantry director</td>
<td>y</td>
</tr>
<tr>
<td>Jennifer Simon</td>
<td>distribution pantry director</td>
<td>y</td>
</tr>
<tr>
<td>Betsy Comstock</td>
<td>guest data director - tracking groceries and appt</td>
<td>y</td>
</tr>
<tr>
<td>Stepahnie Cooutier</td>
<td>Board Member - marketing</td>
<td>y</td>
</tr>
<tr>
<td>Rose Saia</td>
<td>job description TBD - currently handles what is needed</td>
<td>y</td>
</tr>
<tr>
<td>Jim Terry</td>
<td>site director</td>
<td>y</td>
</tr>
<tr>
<td>Jean Husson</td>
<td>volunteer management director</td>
<td>y</td>
</tr>
<tr>
<td>Christine Evans</td>
<td>newsletter/annual appeal, website, donation system, database and surveys</td>
<td>y</td>
</tr>
<tr>
<td>Paulina Knibbe</td>
<td>systems analyst - pantry and volunteer software, tech resource</td>
<td>y</td>
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<tr>
<td>Barbara Blankenship</td>
<td>community meals director</td>
<td>n</td>
</tr>
<tr>
<td>Jennifer Kelly</td>
<td>chief grant writer</td>
<td>n</td>
</tr>
<tr>
<td>Jennifer Soilis</td>
<td>acknowledgments management</td>
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<tr>
<td>Jill Block</td>
<td>guest support board member</td>
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<tr>
<td>Patty Helsingius</td>
<td>Volunteer Outreach</td>
<td>y</td>
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</table>
The following Job Descriptions are available in doc form

1. Executive Director
2. Facilities & Operations Director
3. Food Acquisitions Director
4. Guest Programs Director
5. Administrative Director
6. Volunteer Director
D. Salary Related Surveys and Examples
Salary Surveys

- **TSNE Valuing Our Nonprofit Workforce 2017 Salary Survey**
  - Free Searchable Database for large number of jobs titles
  - Survey conducted in New England and New York state

- **Guidestar 2017 Nonprofit Compensation Report**
  - Limited free sample report data
  - $374 for single user with all data

Examples for two positions on following slides
Salary Example

- FT Operations / Facilities Director
  - **TSNE 2017 Survey - Facilities Manager:** Manages the construction and maintenance of facilities, grounds and equipment. Plans, budgets and schedules facility modifications. Ensures compliance with government health and safety standards. Reviews/analyzes proposals for capital projects and advises senior management on acceptance. Manages capital projects to ensure compliance with budgets and contracts. Manages service contracts. Supervises maintenance and technical staff. May have responsibility for maintenance of organization’s vehicles.

<table>
<thead>
<tr>
<th># of Employees</th>
<th># of Orgs</th>
<th>10th%ile</th>
<th>25%ile</th>
<th>50%ile</th>
<th>75%ile</th>
<th>90%ile</th>
<th>Avg by Employee</th>
<th>Avg by Org</th>
</tr>
</thead>
<tbody>
<tr>
<td>109</td>
<td>77</td>
<td>$45,905</td>
<td>$51,470</td>
<td>$65,000</td>
<td>$85,280</td>
<td>$111,179</td>
<td>$71,266</td>
<td>$73,801</td>
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- **Guidestar 2017 Survey - Top Facilities Position for $250,000 - $500,000 revenue**

<table>
<thead>
<tr>
<th>Count</th>
<th>Average</th>
<th>10th%ile</th>
<th>25%ile</th>
<th>50%ile</th>
<th>75%ile</th>
<th>90%ile</th>
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<tbody>
<tr>
<td>14</td>
<td>$36,389</td>
<td>$22,748</td>
<td>$29,281</td>
<td>$33,600</td>
<td>$42,825</td>
<td>$47,137</td>
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</tbody>
</table>
Salary Example

- **FT Administrative Director**
  - **TSNE 2017 Survey - Accounting Manager:** Manages and performs various accounting activities including developing, implementing and maintaining the accounting systems, policies and procedures; compiling, analyzing and reporting accounting data for management reports and decision-making purposes; may act as primary liaison with outside auditors and government agencies on contract issues. Manages monthly closings. Typically supervises more than three staff members.

<table>
<thead>
<tr>
<th># of Employees</th>
<th># of Orgs</th>
<th>10th%ile</th>
<th>25%ile</th>
<th>50%ile</th>
<th>75%ile</th>
<th>90%ile</th>
<th>Avg by Employee</th>
<th>Avg by Org</th>
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<tr>
<td>95</td>
<td>70</td>
<td>$58,381</td>
<td>$64,272</td>
<td>$72,634</td>
<td>$85,714</td>
<td>$98,035</td>
<td>$75,396</td>
<td>$74,802</td>
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- **Guidestar 2017 Survey - Top Admin. Position for $250,000 - $500,000 revenue**

<table>
<thead>
<tr>
<th>Count</th>
<th>Average</th>
<th>10th%ile</th>
<th>25%ile</th>
<th>50%ile</th>
<th>75%ile</th>
<th>90%ile</th>
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<tbody>
<tr>
<td>446</td>
<td>$46,908</td>
<td>$21,500</td>
<td>$30,070</td>
<td>$41,525</td>
<td>$55,188</td>
<td>$76,085</td>
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ONT Organization Chart and Associated Fiscal Data

Our Neighbors’ Table Organizational Chart

Board of Directors

Executive Director

Development Manager
Office Manager
Program Director

Community Coordinator

Mobile Market Manager
Market Manager
Meal Coordinator
Warehouse Manager
## Our Neighbors' Table

### Fiscal Trends Analysis

<table>
<thead>
<tr>
<th>Program Trends</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td># meals</td>
<td>491,884</td>
<td>543,000</td>
<td>945,586</td>
<td>1,519,000</td>
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<tr>
<td># visits</td>
<td>18,326</td>
<td>19,445</td>
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<td></td>
</tr>
<tr>
<td># people</td>
<td>2,000</td>
<td>2,500</td>
<td>3,400</td>
<td>4,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operating Cost Per Meal</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$0.50</td>
<td>$0.78</td>
<td>$0.71</td>
<td>$0.56</td>
</tr>
</tbody>
</table>

### Total Meals

![Graph showing total meals from 2015 to 2018](#)
### Expense Trends

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Cash Expense</td>
<td>342286</td>
<td>524628</td>
<td>784917.35</td>
<td>1067988</td>
</tr>
<tr>
<td>Admin/Occupancy</td>
<td>43336</td>
<td>75704</td>
<td>81433.42</td>
<td>86098</td>
</tr>
<tr>
<td>Operating</td>
<td>125521</td>
<td>153146</td>
<td>220126.74</td>
<td>332671</td>
</tr>
<tr>
<td>Staffing</td>
<td>173,430</td>
<td>295778</td>
<td>483357.19</td>
<td>594135</td>
</tr>
<tr>
<td>FTE</td>
<td>4.75</td>
<td>5.625</td>
<td>8.25</td>
<td>9.25</td>
</tr>
</tbody>
</table>

**NOTES**
- Prior to move; added Meal and Pantry coordinators
- Move to JTC, added Mobile Market Manager
- Increase meals by 95%, added Development Mgr and Asst
- Narrow budgeting to actual; add warehouse asst; increase FTE by 50%

![Expense Trends Graph](image-url)
### OUR NEIGHBORS' TABLE
#### FISCAL TRENDS ANALYSIS

<table>
<thead>
<tr>
<th>Food/Goods for Guests costs</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchased</td>
<td>98,054</td>
<td>98,949</td>
<td>110,520</td>
<td>224,711</td>
</tr>
</tbody>
</table>

1/30/2018

### Food/Goods Costs

- **2015**: 100,000
- **2016**: 150,000
- **2017**: 200,000
- **2018**: 250,000
### ONT Organization Chart and Associated Fiscal Data

<table>
<thead>
<tr>
<th>Revenue Trends</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising</td>
<td>99,774</td>
<td>124,579</td>
<td>215,892</td>
<td>250,000</td>
</tr>
<tr>
<td>Grants</td>
<td>143,122</td>
<td>234,100</td>
<td>359,715</td>
<td>530,000</td>
</tr>
<tr>
<td>Individual/Corp</td>
<td>112,811</td>
<td>146,129</td>
<td>194,502</td>
<td>234,000</td>
</tr>
<tr>
<td>Total Cash Revenue</td>
<td>356,559</td>
<td>562,733</td>
<td>835,745</td>
<td>1,014,000</td>
</tr>
<tr>
<td>In-kind GBFB</td>
<td>381,362</td>
<td>484,496</td>
<td>847,589</td>
<td>828,532</td>
</tr>
<tr>
<td>In-kind Community Donations</td>
<td>n/a</td>
<td>154,413</td>
<td>552,065</td>
<td>422,628</td>
</tr>
</tbody>
</table>

#### Percent of total Cash Revenue

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising</td>
<td>28%</td>
<td>22%</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Grants</td>
<td>40%</td>
<td>42%</td>
<td>43%</td>
<td>52%</td>
</tr>
<tr>
<td>Individual/Corporate</td>
<td>32%</td>
<td>26%</td>
<td>23%</td>
<td>23%</td>
</tr>
</tbody>
</table>

#### Revenue Trends

- **Fundraising**
- **Grants**
- **Individual/Corporation**
- **Total Cash Revenue**
- **In-kind GBFB**
- **In-kind Community Donations**

### Graphs

- Fundraising
- Grants
- Individual/Corporation
- Total Cash Revenue
- In-kind GBFB
- In-kind Community Donations
Volunteer Survey Results

High response rate:

- 228 out of 1083 responded
  - 21% response rate
  - Industry avg for non-profits is 2% response rate
- Complete set of responses shared with OpenTable
  - PPT and Excel spreadsheets provide detailed responses
- Next steps: Assign Volunteer Director to fully review and establish committee to address key findings

Addressable Findings:

- Some report they aren’t volunteering, simply because they haven’t been asked.
- Some are interested in more of a leadership role
- There are opportunities to improve communications with volunteers (who to report issues with when volunteering, where to park, etc.)
- Self scheduling might help with giving volunteers their preferences (regular vs. sporadic, same role vs. different roles, haven't called...etc)

Very high degree of Volunteer satisfaction both with their own experience and their perception of Guest experience.
F. Guest Survey
Additional Tools/Resources for Implementation

- Some Immediate Considerations
- RACI Organizational Charting
A Few More Things That Should Be Done Soon ...

- Develop mindset of pushing authority to next level
- Be creative about handling pushback so that it doesn’t result in ED double-hatting or increasing direct reports
  - Farm pick-ups. Food Acquisitions Director Responsibility to figure out how to handle. Find and manage a volunteer to do coordination, can the truck/driver be used, etc?
  - Dinner Managers can be co-managers, Pres/vice, CPT/LT etc.to encourage coordination/communication without ED involvement.
- Handle Fundraising as a self managing team reporting to Jeanine.
  - Currently three people designated on OT website.
  - For every fundraising project, designate a project manager.
  - Develop template tool to assist PM to cover project and report to Jeanine/board.
  - Step towards developing metrics
- Grow culture of support
  - OK to raise flags or pushback on requests
  - No one feels absolutely indispensable
  - Ideas are valued and appropriately acted upon
  - Support comes from all levels in the organization look across and down, not just to ED.
What is RACI?

Benefits

Guidelines

Definitions

Implementation steps

Examples
What is RACI?

A technique for identifying functional areas, key activities and decision points where ambiguities exist; differences can be brought into the open and resolved through team effort.

The approach enables management to actively participate in the process of systematically describing activities, decisions that have to be accomplished and to clarify the responsibility that each plays in relation to those activities and decisions.

RACI Benefits

- Clarify individual / departmental roles and responsibilities
- Identify accountabilities
- Eliminate misunderstanding
- Encourage teamwork
- Reduce duplication of effort
- Establish “consults” and “informs” resulting in better communication

Source:
RACI Guidelines

- Remember you are trying to reduce work
  - Eliminate “checkers checking checkers”
  - Encourage teamwork
  - 100% accuracy not required
- Place accountability (A) and responsibility (R) at the level closest to the action or knowledge
- Only 1 accountability per activity
- Authority must accompany accountability
- Minimize the # of consultants [C] and informs [I]
- All roles and responsibilities must be documented and clearly communicated

Source:
## RACI Stands For...

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>R</td>
<td>Responsible</td>
<td>“The doer”</td>
</tr>
<tr>
<td>A</td>
<td>Accountable</td>
<td>“The buck stops here”</td>
</tr>
<tr>
<td>C</td>
<td>Consulted</td>
<td>“In the loop / helping”</td>
</tr>
<tr>
<td>I</td>
<td>Informed</td>
<td>“Keep in the picture”</td>
</tr>
</tbody>
</table>

Source:  
### RACI Definitions

<table>
<thead>
<tr>
<th></th>
<th>Position to work / deliver on activity. Responsibility can be shared.</th>
</tr>
</thead>
<tbody>
<tr>
<td>R</td>
<td>Responsible</td>
</tr>
<tr>
<td>A</td>
<td>Accountable</td>
</tr>
<tr>
<td>C</td>
<td>Consulted</td>
</tr>
<tr>
<td>I</td>
<td>Informed</td>
</tr>
</tbody>
</table>

**Position with YES/NO authority. Ultimate responsibility with VETO power**

**Position involved in the activity. Must at least be consulted before final decision is made.**

**Position that needs to know of the decision or action afterwards.**

Responseibility charting in 6 steps:

1. Introductory meetings to inform key management of purpose and requirements
2. Decision and functions developed into master list
3. Responsibility workshops conducted to agree upon function definitions and to assign codes to individuals / groups. The output is a responsibility chart.
4. Responsibility charts documented and distributed
5. Communication and reinforcement of new role definitions
6. Follow up to encourage execution

RACI Responsibility Chart

Source:
### RACI Responsibility Chart

<table>
<thead>
<tr>
<th>Business Processes</th>
<th>Functional Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>R</td>
</tr>
<tr>
<td>Decisions / Functions / Activities</td>
<td>A</td>
</tr>
<tr>
<td></td>
<td>C</td>
</tr>
<tr>
<td></td>
<td>C</td>
</tr>
<tr>
<td></td>
<td>I</td>
</tr>
<tr>
<td></td>
<td>I</td>
</tr>
</tbody>
</table>

RACI Vertical Analysis

Vertical Analysis

Functional Roles

<table>
<thead>
<tr>
<th></th>
<th>R</th>
<th>A</th>
<th>C</th>
<th>I</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>R</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>R</td>
<td>A</td>
<td>C</td>
<td></td>
<td>R</td>
</tr>
<tr>
<td>C</td>
<td>R</td>
<td>A</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source:
## RACI Vertical Analysis

<table>
<thead>
<tr>
<th>If You Find:</th>
<th>Then Ask:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lots of R’s</td>
<td>Can or need the individual(s) stay on top of so much? Can the decision/activity be broken into smaller, more manageable functions?</td>
</tr>
<tr>
<td>No empty spaces</td>
<td>Does the individual(s) need to be involved in so many activities? Are they a “gatekeeper” or could management by exception principles be used? Can C’s be reduced I’s, or left to the individual’s discretion when something needs particular attention?</td>
</tr>
<tr>
<td>No R’s or A’s</td>
<td>Should this functional role be eliminated? Have processes changed to a point where resources should be re-utilized?</td>
</tr>
<tr>
<td>Too many A’s</td>
<td>Does a proper “segregation of duties” exist? Should other groups be accountable for some of these activities to ensure checks and balances and accurate decision making throughout the process? Is this a “bottleneck” in the process—is everyone waiting for decisions or direction?</td>
</tr>
<tr>
<td>Qualifications</td>
<td>Does the type or degree of participation fit the qualifications of this role?</td>
</tr>
</tbody>
</table>

Source:
### RACI Horizontal Analysis

![Horizontal analysis](image)

<table>
<thead>
<tr>
<th></th>
<th>R</th>
<th>A</th>
<th>C</th>
<th>I</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>R</td>
<td>C</td>
<td>C</td>
<td>I</td>
<td>I</td>
</tr>
<tr>
<td>C</td>
<td>C</td>
<td>R</td>
<td>C</td>
<td>C</td>
<td>R</td>
</tr>
<tr>
<td>I</td>
<td>A</td>
<td>R</td>
<td>C</td>
<td>R</td>
<td></td>
</tr>
<tr>
<td></td>
<td>C</td>
<td>R</td>
<td>A</td>
<td>C</td>
<td></td>
</tr>
</tbody>
</table>

Source:
## RACI Horizontal Analysis

<table>
<thead>
<tr>
<th>If You Find:</th>
<th>Then Ask:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No R’s</td>
<td>Is job getting done? Some roles may be waiting to approve, be consulted, or informed. No one sees their role to take the initiative.</td>
</tr>
<tr>
<td>Too many R’s</td>
<td>Is this a sign of “over the wall” activities? “Just get it off my desk ASAP!”</td>
</tr>
<tr>
<td>No A’s</td>
<td>Why not? There must be an “A.” Accountability should be pushed down to the most appropriate level.</td>
</tr>
<tr>
<td>Too many A’s</td>
<td>Is there confusion? “I though you had it!” It also creates confusion because every person with an “A” has a different view of how it is or should be done.</td>
</tr>
</tbody>
</table>

### RACI Horizontal Analysis

<table>
<thead>
<tr>
<th>If You Find:</th>
<th>Then Ask:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Too few A’s and R’s</td>
<td>The process must slow down while the activity is performed on an “ad hoc” basis. Or the procedure may be outdated and can be streamlined if not needed.</td>
</tr>
<tr>
<td>Lots of C’s</td>
<td>Do all the functional roles really need to be consulted? Are there justifiable benefits in consulting all the roles?</td>
</tr>
<tr>
<td>Lots of I’s</td>
<td>Do all the roles need to be routinely informed or only in exceptional circumstances?</td>
</tr>
<tr>
<td>Every box filled in</td>
<td>They shouldn’t be. If they are, too many people are involved—usually too many “C’s” and “I’s.”</td>
</tr>
</tbody>
</table>

# Sample RACI Chart [ILLUSTRATIVE]

<table>
<thead>
<tr>
<th>R</th>
<th>A</th>
<th>C</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsible - does work</td>
<td>Accountable - owns decision</td>
<td>Consulted</td>
<td>Informed</td>
</tr>
</tbody>
</table>

## Internal Processes

<table>
<thead>
<tr>
<th>Identify Grant opportunities</th>
<th>Market Strategies</th>
<th>Leadership/Support</th>
<th>Customer Team</th>
<th>PMO</th>
<th>Solutions Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify and execute growth with Foundations</td>
<td>ED</td>
<td>A</td>
<td>I</td>
<td>C</td>
<td>R</td>
</tr>
<tr>
<td>Identify and execute growth with Gov’t</td>
<td>ED</td>
<td>A</td>
<td>I</td>
<td>C</td>
<td>R</td>
</tr>
<tr>
<td>Identify and execute growth with Industry</td>
<td>ED</td>
<td>A</td>
<td>I</td>
<td>C</td>
<td>R</td>
</tr>
<tr>
<td>Identify and execute growth with Utilities</td>
<td>ED</td>
<td>A</td>
<td>I</td>
<td>C</td>
<td>R</td>
</tr>
<tr>
<td>Prioritize potential projects</td>
<td>ED</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
</tbody>
</table>