Share Food
Case Study
The Share Food Case Study was prepared for use in the 2007 Malcolm Baldrige National Quality Award Examiner Preparation Course. The Share Food Case Study describes a fictitious nonprofit organization. There is no connection between the fictitious Share Food and any other organization, either named Share Food or otherwise. Other organizations cited in the case study also are fictitious, except for several national and government organizations. Because the case study is developed to train Baldrige Examiners and others and to provide an example of the possible content of a Baldrige application, there are areas in the case study where Criteria requirements are not addressed. This case study is based on the 2007 Criteria for Performance Excellence, which is used by both business and nonprofit organizations.
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1. Applicant

Official Name: Share Food
Other Name: n/a
Prior Name: n/a

Headquarters Address: 3353 Heartland Street
Des Couers, IA 62871

Has the applicant self-certified for eligibility in a prior year(s)?
☐ Yes  ☐ No  ☐ Do Not Know

If “Yes,” indicate the year(s) in which the applicant submitted the Eligibility Certification Package and the name(s) of the applicant at that time, if different.

Year(s)

Name(s) of Applicant

2. Highest-Ranking Official

☐ Mr.  ☐ Mrs.  ☐ Ms.  ☐ Dr.

Name: Nancy Goode
Title: Executive Director
Telephone No.: (555) 518-2431
E-Mail: NGoode@sharefood.org
Address: 3353 Heartland Street
Des Couers, IA 62871
Fax No.: (555) 518-2435

3. Eligibility Contact Point

☐ Mr.  ☐ Mrs.  ☐ Ms.  ☐ Dr.

Name: Wilma Royale
Title: Executive Assistant
Telephone No.: (555) 518-2432
Fax No.: (555) 518-2435
E-Mail: WRoyale@sharefood.org
Address: 3353 Heartland Street
Des Couers, IA 62871
Overnight Mailing Address (Do not use a P.O. Box number):
15 S. Central Avenue
Des Couers, IA 62874

4. Alternate Eligibility Contact Point

☐ Mr.  ☐ Mrs.  ☐ Ms.  ☐ Dr.

Name: Nancy Goode (see above)
Telephone No.: (555) 518-2431
Fax No.: (555) 518-2435

5. Applicant Status

a. Has the applicant officially or legally existed for at least one year, or prior to April 10, 2006? (Check one.)
   ☐ Yes  ☐ No

If you are unable to respond to any item, please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
5. Applicant Status—continued

b. Has your organization ever been a Malcolm Baldrige National Quality Award recipient? (Check one.)
   □ Yes □ No
   If you checked “No,” proceed to item 6.

c. If “Yes,” was your organization an Award recipient in 2001 or earlier? (Check one.)
   □ Yes □ No
   If you checked “No,” your organization is not eligible to reapply this year for the Award or for feedback
   (please contact the Baldrige National Quality Program Office at [800] 898-4506 if you have any questions).
   If you checked “Yes,” please choose one of the following options:
   □ Applying for feedback only □ Applying for the Malcolm Baldrige National Quality Award

6. Award Category and For-Profit/Nonprofit Designation (Check as appropriate.)

□ Manufacturing (For-Profit Only) □ Nonprofit □ Health Care (For-Profit)
□ Service (For-Profit Only) □ Education (For-Profit) □ Health Care (Nonprofit)
□ Small Business (For-Profit Only) □ Education (Nonprofit)

Criteria being used: (Check one.)
□ Criteria for Performance Excellence (for use by businesses and nonprofit organizations)
□ Education Criteria for Performance Excellence
□ Health Care Criteria for Performance Excellence

Note: Education and health care organizations may choose to use the Criteria for Performance Excellence and apply in the
service, small business, or nonprofit categories. However, they probably will find their sector-specific Criteria (Education
Criteria for Performance Excellence or Health Care Criteria for Performance Excellence) more appropriate.

7. Industrial Classification
List up to three of the most descriptive three- or four-digit NAICS codes. (See page 26.)
a. 624 □□□□ b. 722 □□□□ c. 424 □□□□

8. Size and Location of Applicant

a. Total size of the workforce: 10.5 FTE* people *full-time equivalent: 8 full-time, 5 part-time

b. For the preceding fiscal year,
   • check one financial descriptor: □ Sales □ Revenues □ Budgets
   • check the range: □ 0–$1M □ $1M–$10M □ $10M–$100M □ $100M–$500M
     □ $500M–$1B □ More than $1B

c. Number of sites: U.S./Territories □□□□ Outside U.S./Territories □□□□

If you are unable to respond to any item,
please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
Malcolm Baldrige National Quality Award

8. Size and Location of Applicant—continued

d. Percentage of employees: U.S./Territories \(100\%\) Outside U.S./Territories _______

e. Percentage of physical assets: U.S./Territories \(100\%\) Outside U.S./Territories _______

f. Operational practices associated with all major organizational functions must be accessible for examination in the United States. If some activities are performed outside the applicant’s organization (e.g., by a component of the applicant that is outside the United States or its territories, the parent organization, or its other subunits), will the applicant, if selected for a site visit, make available in the United States sufficient personnel, documentation, and facilities to allow full examination of its operational practices for all major functions of its worldwide operations?

☐ Yes  ☐ No  ☑ Not Applicable

g. In the event the applicant receives an Award, can the applicant make available sufficient personnel and documentation to share its practices at The Quest for Excellence Conference and at its U.S. facilities?

☑ Yes  ☐ No

h. Attach a line and box organization chart for the applicant. In each box, include the name of the unit or division and its head.

9. Subunits (If the applicant is not a subunit as defined in the Eligibility Certification Overview on pages 8–9, please proceed to question 10.)
a. Is the applicant ______ a larger parent or system? (Check all that apply.)

☐ a subsidiary of  ☐ controlled by  ☐ administered by  ☐ owned by

☐ a division of  ☐ a unit of  ☐ a school of

b. Parent organization (“Parent” means the highest organizational level eligible to apply for the Award.)

Name ___________________________________________ Highest-Ranking Official

Address ___________________________________________

_________________________________________________

Name ___________________________________________

_________________________________________________

Title ___________________________________________

Size of the worldwide workforce of the parent: _______ people

c. Is the applicant the only subunit of the parent organization intending to apply? (Check one.)

☐ Yes  ☐ No (Briefly explain.)  ☐ Do Not Know

d. Briefly describe the major functions provided to the applicant by the parent or by other subunits of the parent. Examples of such functions include, but are not limited to, strategic planning, business acquisition, research and development, data gathering and analysis, human resources, legal services, finance or accounting, sales/marketing, supply chain management, global expansion, information and knowledge management, education/training programs, information systems and technology services, curriculum and instruction, and academic program coordination/development.

If you are unable to respond to any item, please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
9. Subunits—continued

e. Is the applicant self-sufficient enough to respond to all seven Baldrige Criteria Categories?
   □ Yes  □ No (Briefly explain.)

f. Provide the name and date of the official document (e.g., annual report, organization literature, press release) supporting the subunit designation. **Attach relevant portions** of the document showing clear definition of the applicant as a discrete entity.

   *Note: Applicants supplying a Web site as documentation must print the relevant pages and include these with their Eligibility Certification Form.*

   Name of the Document ___________________________ Date ___________________________

  g. Briefly describe the organizational structure and relationship to the parent.

   Attach a line and box organization chart(s) showing the relationship of the applicant to the highest management level of the parent, including all intervening levels. Each box within the chart should include the name of the head of the unit or division.

  h. Is the applicant's product or service unique within the parent organization? (Check one.)
   □ Yes  □ No

   If “No,” do other units within the parent provide the same products or services to a different customer base? *(Check one.)*
   □ Yes  □ No

   If both of the boxes in “h” are checked “No,” complete 1, 2, and 3 below.

   (1) Provide a brief description of how the market and product(s) or service(s) are similar.

   (2) Indicate the organizational relationships of all units that provide similar or identical products or services, including the approximate sales, revenues, or budgets for each.

   (3) Describe how the applicant is different from its parent and the other subunits of the organization (e.g., differences in market, location, or name).

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If you are unable to respond to any item, please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
Malcolm Baldrige National Quality Award

9. Subunits—continued

i. Manufacturing and service subunits of parents with >500 employees, only (subunits not applying in the manufacturing or service Award categories should not complete this item).

For a subunit to be eligible, 50 percent or more of its products or services must be sold or provided directly to customers/users outside the applicant’s organization, its parent organization, and other organizations that own or have financial or organizational control of the applicant or parent.

- Does the applicant have more than 500 employees? (Check one.)
  - Yes
  - No

- Do the applicant’s employees make up more than 25 percent of the worldwide employees of the parent? (Check one.)
  - Yes
  - No

j. All manufacturing and service subunits, regardless of parent size, that have fewer than 500 employees and less than 25 percent of all employees in the worldwide operations of the parent (organizations other than manufacturing and service subunits should not complete this item).

Note: If the answer to either of the following questions is “Yes,” the applicant is eligible in the small business category.

- Was the applicant independent prior to being acquired, and does it continue to operate independently under its own identity? (Check one.)
  - Yes
  - No

Note: If self-certification is based on the subunit being independent prior to being acquired and continuing to operate independently under its own identity, attach relevant portions of an official document to support this response.

- Is the applicant separately incorporated and distinct from other subunits of the parent? (Check one.)
  - Yes
  - No

Note: If self-certification is based on the subunit being separately incorporated and distinct from other subunits of the parent, attach relevant portions of an official document (e.g., articles of incorporation) to support this response.

If all answers to “i” and “j” are “No,” contact the Baldrige Office at (800) 898-4506 before submitting your form.

If you are unable to respond to any item, please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
10. Supplemental Sections (Check one.)

☐ The applicant has (a) a single performance system that supports all of its product and/or service lines and (b) products or services that are essentially similar in terms of customers/users, technology, workforce or employee types, and planning.

☐ The applicant has (a) multiple performance systems that support all of its product and/or service lines and/or (b) products or services that are not essentially similar in terms of customers/users, technology, workforce or employee types, and planning.

If you checked the second option, please describe briefly the differences among the multiple performance systems of your organization in terms of customers, workforce or employee types, technology, planning, and quality systems.

Note: The applicant's Eligibility Contact Point will be contacted if the second option is checked. Applicants may have two or more diverse product and/or service lines (i.e., in different NAICS codes) with customers, types of employees, technology, planning, and quality systems that are so different that the application report alone does not allow sufficient detail for a fair examination. Such applicants may submit one or more supplemental sections in addition to the application report. The use of supplemental sections must be approved during the eligibility certification process and is mandatory once approved.

11. Application Format

If your organization applies for the 2007 Award, in which format would you submit the Application Package? (Check one.)

☐ 25 paper copies (due date May 24, 2007) ☐ CD (due date May 10, 2007)

12. Confidentiality Considerations

Baldrige Examiners are authorized to use cell phones, cordless phones, and VoIP to discuss your application.

☐ Yes ☐ No

13. Self-Certification Statement, Signature of the Highest-Ranking Official

I state and attest that

(1) I have reviewed the information provided by my organization in this Eligibility Certification Package.

(2) to the best of my knowledge,

• no untrue statement of a material fact is contained in this Eligibility Certification Package, and

• no omission of a material fact has been made in this package.

(3) based on the information herein and the current eligibility requirements for the Malcolm Baldrige National Quality Award, my organization is eligible to apply.

(4) I understand that at any time during the 2007 Award Process cycle, if the information is found not to support eligibility, my organization will no longer receive consideration for the Award and will receive only a feedback report.

Signature of Highest-Ranking Official

Nancy Goode

Printed Name

March 9, 2007

Date

If you are unable to respond to any item, please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
Malcolm Baldrige National Quality Award

14. Eligibility Certification Filing Fee

Provide payment for the $150 nonrefundable fee to cover the cost of the eligibility filing process. Please indicate which method of payment will be provided:

☐ Check (enclosed)  ☐ Money order (enclosed)  ☐ ACH payment  ☐ Wire transfer
☐ VISA  ☐ MasterCard  ☐ American Express

Check or money order

Please make your check or money order payable to the Malcolm Baldrige National Quality Award. Send the check or money order as part of the Eligibility Certification Package to:

Malcolm Baldrige National Quality Award
c/o ASQ
600 North Plankinton Avenue
Milwaukee, WI 53203

ACH payment or wire transfer

Checking ABA Routing Number: 075-000-022
Checking Account Number: 182342002330

Please reference the Malcolm Baldrige National Quality Award with your payment. ASQ must be contacted either by phone at (414) 765-7205 or e-mail at mbnqa@asq.org before an ACH payment or wire transfer is sent.

VISA, MasterCard, or American Express

Credit Card Number

Authorized Signature

Expiration Date

Printed Name

Billing Address for Credit Card

Today’s Date

W-9 Request

If you require an IRS W-9 Form (Request for Taxpayer Identification Number and Certification), please contact the American Society for Quality at (414) 765-7205.”

The 2007 Eligibility Certification Package must be sent on or before April 10, 2007, to be considered for the 2007 Award. The Eligibility Certification Package must include a proof of the mailing date. One option to fulfill this requirement is to send the package via a delivery service (e.g., Airborne Express, Federal Express, United Parcel Service, or the United States Postal Service [USPS] Express Mail) that automatically records the mailing date. If the package is mailed through the USPS (via a service other than Express Mail), applicants must include a dated receipt from the post office in the package.

If you are unable to respond to any item, please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
One senior member from each organization whose Eligibility Certification Package is sent (with a proof of the mailing date) on or before March 9, 2007, may become a member of the 2007 Board of Examiners. The opportunity to learn and the required commitment of time are substantial. The time commitment is a minimum of 114 hours from April to December (including approximately 40 hours in April/May to complete prework for the Examiner Preparation Course, 3–4 days in May to attend the preparation course, and another 50–70 hours from June through September to complete the Independent and Consensus Review). If requested by the Program, Examiners also are expected to participate in the Site Visit Review (approximately 9 days).

Nominees must be citizens or permanent residents of the United States and be located in the United States or its territories.

Mrs. Nancy Goode from our organization will serve on the 2007 Board of Examiners.

*Please, no substitutions after April 10, 2007.

Nominee's contact information:

- Mr.  Mrs.  Ms.  Dr.

Nominee's Title: Executive Director

Name of Nominee's Organization: Share Food

Nominee's Work Address: 3353 Heartland Street, Des Couers, IA 62871

Nominee's Home Address: 15500 N.E. Highland, Des Couers, IA 62873

Note: Place an asterisk next to your preferred phone number, fax number, and e-mail address.

Work Telephone No.: (555) 518-2431*

Work Fax No.: (555) 518-2435*

Work E-Mail Address: NGoode@sharefood.org*

Home Telephone No.: (555) 796-5555

Home Fax No.: --

Home E-Mail Address: --

If you are unable to respond to any item, please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
## 2007 Eligibility Certification Form

### Malcolm Baldrige National Quality Award

The following information is needed by the Malcolm Baldrige National Quality Program Office to avoid conflicts of interest when assigning Examiners to evaluate your application and by Examiners in performing their evaluations.

### 16. Site Listing and Descriptors

Please refer to the instructions on page 13 of this document to complete this Site Listing and Descriptors form. It is important that the totals for the number of employees, faculty, and/or staff; percentage of sales, revenues, or budgets; and number of sites on this form match the totals provided in response to 8a, 8b, and 8c on pages 2 and 3 of the 2007 Eligibility Certification Form. For example, if you report a workforce of 600 people in response to question 8a, the total number of employees/faculty/staff provided in the Site Listing and Descriptors form should be 600 (see example below). For another example, see page viii of the *Arroyo Fresco Community Health Center Case Study* ([www.baldrige.nist.gov/Arroyo.htm](http://www.baldrige.nist.gov/Arroyo.htm)). Duplicate the Site Listing and Descriptors page if all sites cannot be listed on a single page.

<table>
<thead>
<tr>
<th>Address of Site(s)</th>
<th>Number</th>
<th>Percentage</th>
<th>For each site, describe the relevant products, services, and/or technologies.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coyote Hall</td>
<td>381</td>
<td>95%</td>
<td>Administrative headquarters, instructional and educational services</td>
</tr>
<tr>
<td>85 Campus Way</td>
<td>Faculty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Albuquerque, NM 77351</td>
<td>200</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cactus Hall</td>
<td>17</td>
<td>5%</td>
<td>Satellite campus for information technology instruction, including a technology lab</td>
</tr>
<tr>
<td>85 IT Parkway</td>
<td>Faculty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bernalillo, NM 76052</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Provide all the information for each site, except where multiple sites produce similar products or services. For multiple site cases, refer to 8c on page 2 of the Eligibility Certification Form. Also, see the 2007 Eligibility Certification Form—Instructions on page 11 of this document.

**Use as many additional copies of this form as needed to include all sites.**

If you are unable to respond to any item, please contact the Baldrige National Quality Program Office at (800) 898-4506 before submitting your form.
17. **Key Business/Organization Factors**

List, briefly describe, or identify the following key organization factors. Be as specific as possible to help us avoid real or perceived conflicts of interest when assigning Examiners to evaluate your application. “Key” means those organizations that constitute 5 percent or more of the applicant’s competitors, customers/users, or suppliers.

A. **List of key competitors**
   - Share Food competes with several other local, state, regional, and international social service and philanthropic organizations, such as the Conservancy Corps, Harmony Helps, and Heroic Blood Donations, for donations/funds from individuals, for volunteers, and for in-kind donations of food from retailers and distributors.
   - Share Food does not consider other organizations with a common mission of feeding the hungry as competitors. Instead, it works with them to end hunger in the communities served through collaborations such as the FEED Iowa Partnership.

B. **List of key customers/users**
   - As a food bank that operates a 30,000-square-foot warehouse, Share Food distributes food to 58 member agencies that are local, public, faith-based, and/or private organizations. These include food pantries, soup kitchens, homeless shelters, senior centers, seasonal youth activity centers, daycare centers, and shelters that directly feed and give repackaged meals to the hungry in a six-county service area in Iowa. Share Food also works with its member agencies to improve their outreach capabilities. The majority of results presented in this application refer to the average or total of all 58 of Share Food’s member agencies. However, in one figure in Item 7.1 and a few figures in Item 7.2, results are segmented by three sample member agencies—WellnessBase, SeniorApproach, and Assist Each Other—that represent the average organizational size and reach of its member agencies. These select figures are presented to show that Share Food segments by its member agencies. Food-insecure individuals who use the services provided by member agencies are considered clients of Share Food.

C. **List of key suppliers/partners**
   - Corporate contributors
   - Regional food manufacturing, processing, and packaging facilities, including Platinum Foods, Blue Troll, Inc., and Linda Foods Corporation
   - Retail grocers
   - Restaurants
   - Agricultural organizations and farmers, including community gardens
   - Community and business groups that provide manpower and willing hands for special projects and initiatives
   - Ways of Connection (a nonprofit umbrella organization)
   - Charitable foundations
   - Federal, state, and local governments
   - The Emergency Food Assistance Program (TEFAP)
   - Food Banks of America (FBA), Iowa Food Bank Association (IFBA), and The Food Bank Learning Collaborative (FBLC)
   - Regional Network of Relief Agencies
   - Des Couers University
   - Communities in six Iowa counties
   - Local courts for court-appointed community-service placements
   - Taxpayers
   - Greater Des Couers Area Chamber of Commerce
D. Description of the applicant’s major markets (local, regional, national, and international)

Share Food’s total market is the Des Couers metropolitan statistical area (MSA) of 500,000 people, from which it receives the majority of its operating resources. The food bank serves member agencies within this MSA, which comprises the population center of Des Couers (population 200,000) and five contiguous counties (Knowles, Bountiful, Peaceful, Houston, and Rison).

E. The name of the organization’s financial auditor

David & Bradley, LLP (services provided pro bono to Share Food)

F. The applicant’s fiscal year (e.g., October 1–September 30)

January 1–December 31
Share Food Organization Chart

Board of Directors
- Program/Operations Committee
- Finance/Audit Committee
- Development Committee
- Agency Relations Committee
- Friend-Raising Committee

Executive Director
Nancy Goode

Executive Assistant
Wilma Royale

Volunteer & Outreach Manager
Ann Novak
- Recruitment
- Scheduling
- Professional Development
- Outreach

Agency & Industry Relations Manager
Michael Torres
- Member Agencies
- Governmental Relations
- Collaborative Networks

Development Director
Maggie Vang
- Grants
- Community Development
- Corporate Development

Program Director/CFO
Randy Thiesen
- Finance
- Supply Chain
- Warehouse Management

Community- and Business-Based Committees and Individual Volunteers
# Glossary of Terms and Abbreviations

## A

**AAFNHA**
American Association of Food and Nutrition for a Healthier America

**AI**
appreciative inquiry

**AR**
accounts receivable

**Assist Each Other**
member agency that works in rural areas, primarily with migrant populations

**Assistance Now Finder**
one of the nation’s largest independent charity evaluators; provides free financial evaluations and ratings of nonprofit organizations

## B

**Balanced Plate Scorecard**
balanced scorecard used to align and integrate individual measures within the “FOODS” framework; “FOODS” represents SF’s key success factors

## C

**CAP**
Community Action Program

**CEO**
Chief Executive Officer

**CFO**
Chief Financial Officer

**CHCAP**
Consumer Health Care Aid Program

**commodities**
food goods, supply, or stock for future or emergency use

**Corporate Contributor Program**
program in which several key donor organizations fund SF’s general administrative overhead expenses

**CPA**
certified public accountant

**CPP**
Community Progress Project

**CSA**
community-supported agriculture

**CSFP**
Commodity Supplemental Food Program
administered by the Food and Nutrition Service of the USDA; benefits are awarded on a case-load (i.e., grants) basis

**CTQ**
critical to quality

## D

**D&O**
directors’ and officers’ insurance

**DHFS**
Iowa’s Department of Health and Family Services

**Dietary Guidelines for Americans, 2005**
published by the U.S. Department of Health and Human Services, the guidelines provide advice on good dietary habits

**DU**
Des Couers University

**E**

**EMS**
emergency medical services

**EPA**
Environmental Protection Agency

**ERP**
Emergency Response Plan

## F

**FBA**
Food Banks of America

**FBI**
Federal Bureau of Investigation

**FBLC**
The Food Bank Learning Collaborative

**FDA**
Food and Drug Administration

**FEED Iowa Partnership**
Food as an Economic Engine for Development (Iowa) Partnership

**FEMA**
Federal Emergency Management Agency
fill rate
measures the percentage of food (in pounds) from SF’s orders that are delivered to member agencies

food banking
the operation of a warehouse used to store and distribute donated food products

Food Nutrition Scale
AAFNHA’s scale that measures the nutritional value of food

FoodAnswers
software developed by FBA and awarded to SF as part of a 2004 grant; IA Tech Firm monitors and upgrades the software. It allows users to access Visual Process descriptions and search best practices, and it can aggregate complaints for use in improvements.

food-insecure
as measured by USDA surveys, the food-insecure are those people who do not have access at all times to enough food for an active, healthy life

FOODS
SF’s key success factors: food availability and quality, fiscal agility, and funding and food resources; organizational effectiveness and optimization of human, financial, food, and other resources; organizational learning, collaboration, and innovation; dedicated and experienced employees and volunteers; satisfaction

FSP
Food Stamp Program
administered by the Food and Nutrition Service of the USDA; an entitlement program: if a person is eligible, he or she may receive services

FTE
cfull-time equivalent employee

FY
fiscal year

H
HCCAP
Health Care Consumer Assistance Program

hedgehog concept
management thinker and educator Jim Collins’ concept that during an organization’s “journey from good to great,” people are either foxes or hedgehogs. Foxes know many things, but the hedgehog knows well one big thing. In business, to achieve greatness, Collins teaches that an organization must make good decisions consistent with a simple, coherent concept (a hedgehog concept) over a long period of time.

HHS
U.S. Department of Health and Human Services
P

PDCA
Plan-Do-Check-Act Process

PIT
process improvement team

POS
point of service

primary revenue growth
an indicator defined by revenue, including any revenue from services, grants, and donations that SF generates

pro bono
work provided free of charge

program expenses growth
an indicator that calculates the average annual growth of program expenses over a period of three to five years

R

RICE
Rapid Inventory Control Enterprise allows employees and volunteers real-time knowledge of what food is available, where it is located, and its expiration status

SeniorApproach
member agency that provides meals to senior citizens

SF
Share Food

Share Food for Thought
Share Food’s newsletter

SIPOC Diagram
a tool used in the Six Sigma methodology. The tool name prompts the consideration of suppliers (S), inputs (I), the process (P), outputs (O), and customers (C) of the process.

SPP
Strategic Planning Process

SWOT
strengths (S), weaknesses (W), opportunities (O), and threats (T) analysis (strengths are internal performance and capabilities; weaknesses and opportunities are gaps; threats include needs analysis/expected demand, economic and governmental issues, and anything that impacts the food supply)

TEFAP
The Emergency Food Assistance Program administered by the Food and Nutrition Service of the USDA; an entitlement program: if a person is eligible, he or she may receive services

USDA
U.S. Department of Agriculture

V-team
employee and volunteer team

WellnessBase
member agency, which includes a summer food program that provides food to children

WIC
Supplemental Nutrition Program for Women, Infants, and Children administered by the Food and Nutrition Service of the USDA; benefits are awarded on a case-load (i.e., grants) basis

working capital ratio
an indicator that establishes the period of time in years that an organization would be able to operate at its current level of spending if only using its assets
Preface: Organizational Profile

P.1 Organizational Description
Achieving Share Food (SF)'s vision of a hunger-free heartland would put it out of business—and nothing would make it happier.

SF is a community-based nonprofit 501(c)(3) corporation that distributed in 2006 nearly 7.5 million pounds of food to the food-insecure through partnerships with 58 member agencies. These partnerships play a key role in maintaining a safety net of services for the residents of a six-county service area. Four counties—Des Couers, Knowles, Bountiful, and Peaceful—represent urban areas. Peaceful County’s Hmong and Hispanic populations have doubled in the past year. Due to recent plant closings, the unemploy-ment rate in Bountiful exceeds the national average, reaching a state high of nearly 13 percent. Two additional counties, Houston and Rison, are rural areas with a significant number of families and individuals living below the federal poverty guidelines, and both counties are home to large migrant farming communities.

P.1a(1) SF operates a food bank, which is essentially a wholesaling operation. It acquires, warehouses, transports, and distributes large volumes of food to its member agencies. Food bank operations have evolved and grown as SF’s major donors of food have expressed preference for a single point of service for delivery, predictability of operations, and coordinated management of their donations.

Over the years, SF expanded its services to operate its own food pantries and soup kitchens. However, in 2002, the SF Board of Directors determined that its core competency was in food banking, so SF identified, negotiated, and partnered with member agencies to take over these services. In 2003, with its more focused operations on food banking, SF reduced its staff by one full-time employee and one part-time employee.

Today, SF operates as a food bank warehouse, with a meal repackaging facility. It distributes food pallets, food boxes, repackaged meals, and grocery items to member agencies that share a common mission. Over the last decade, the nutritional quality of food, along with quantity, has become a key consideration. SF works with its suppliers to increase donations of food in accordance with the Dietary Guidelines for Americans, the United States Department of Agriculture (USDA) Food Pyramid, and the American Association of Nutrition Scale.

While not directly related to food products or delivery, another key service of SF is its development activities. Whether directed to government, corporations (including food manufacturers and grocery chains), or individuals, fund and resource development is the core to SF’s survival and growth.

The delivery mechanism is a network of paid employees and volunteers. Using SF’s two trucks and one van, employees or volunteers seek out and collect food and monetary donations; pick food up from throughout the region; bring it to SF to sort, inventory, and repackage; and distribute it to SF’s member agencies. Depending on the member agency, this might be done on a daily, weekly, or monthly basis. SF works hard to ensure that it is providing the best foods, at the right time, and to the right place.

P.1a(2) SF’s organizational culture is characterized by a set of behaviors that are modeled by senior leaders and that have evolved from its mission, vision, and values (MVV) (Figure P.1-2). The vision is intended to set a high threshold to motivate SF’s employees and volunteers. Everyone associated with SF acts in accordance with the MVV, and its culture, as a result, reflects honest and sincere compassion for the food-insecure and a clear understanding of the importance of what employees and volunteers do each day. This is why SF’s suppliers and donors trust SF with their resources. It is a trust that SF is careful to deserve.

P.1a(3) SF draws on nearly 500,000 residents of the Des Couers region for its workforce: a small number of employees and a large pool of volunteers that includes students and fellows. Employees provide continuity and operational controls. SF employs eight full-time and five part-time employees (as well as cultivates “core” volunteers). In addition, SF has established itself as an internship site for nutrition and management students from Des Couers University (DU), and it receives fellows from local and state governments and foundations. This special expertise augments SF’s workforce capacity and helps keep it current on emerging practices and trends in food banking. See Figure P.1-2a for workforce groups and their key requirements and expectations.

In 2006 SF’s standing in the community was evidenced by more than 500 individuals who volunteered their knowledge, skills, time, and energy. Volunteers are led by a core team of 20 individuals who devote more than 11 hours each week to SF efforts and are considered volunteer leaders because they have completed
Key benefits for employees are health and dental insurance, which are available under the auspices of a statewide collaborative, the United Iowa Agencies, that leverages multiple small nonprofit organizations to obtain better rates. Employees can take advantage of flexible work schedules, as long as core services are covered. Other benefits, such as in-kind gifts from local museums, entertainment providers, and so forth, are shared equitably throughout SF, without regard for whether the recipient is an employee or core volunteer. They also are often auctioned at an event or given as an event door prize.

P.1a(4) SF’s facility is a warehouse that has an extensive and critical refrigerator/freezer system to protect its donated perishable food products. The 30,000-square-foot warehouse can store up to one million pounds of donated food. Food is delivered on pallets and is then divided into cases for delivery to member agencies. Racking allows nonperishable food items to be sorted, inventoried, and stored until needed. The warehouse itself was donated to SF in the mid-1980s. Although renovations were needed to create limited office space, the building is mortgage-free, allowing SF to invest in better equipment for food storage, preparation, and transport.

A key product of pro bono work from a local information technology firm, IA Tech Firm, was the installation and oversight of a PC-based best-practice-tracking software program. The program, FoodAnswers, was developed by the national Food Banks of America (FBA) and awarded to SF as part of a 2004 grant. SF’s relationship with IA Tech Firm has allowed upgrades to be installed seamlessly. Another software program called Rapid Inventory Control Enterprise (RICE) provides employees and volunteers with real-time knowledge of what food is available, where it is located, and its expiration status. SF has spent capital on hardware to support critical functions, and it has accepted selected donated equipment for other administrative activities. IA Tech Firm has continued to offer pro bono support for the maintenance of SF’s hardware and software.

P.1a(5) SF must meet strict regulations governing the food industry. In addition, it is governed by regulations protecting workers and the member agencies it serves. Some of the most important regulating agencies and standards are shown in Figure P.1-3. Resources are available to help SF and its member agencies make sense of the various regulations and to train employees and volunteers. One of the most important has been the State
Cooperative Safety of Food Project. SF also has been awarded grants from several different private foundations, the USDA, food manufacturers and packaging companies, and large grocery operations. Each has special requirements that must be met. SF has obtained directors’ and officers’ (D&O) insurance as a safeguard for its volunteer and employee leaders, and it invests in a set of insurance policies to address the liabilities created by volunteers’ transporting, preparing, and delivering food products. SF voluntarily adheres to the accountability standards set forth by the Iowa Council of Nonprofits and Iowa Charities Review.

P.1b(1) SF is governed by a 12-member Board of Directors recruited from SF communities who remain in service to them. One position on the board is appointed by the Des Couers County Commission, and one position is reserved for a representative of SF’s member agencies (a position rotated among the member agencies). The board provides governance oversight to SF, approves the annual operating budget, participates in strategic planning, and holds itself accountable for the operations of the organization. The Board of Directors has five subcommittees: the Finance/Audit Committee has three members and provides counsel and oversight to the Program Director in his role as Chief Financial Officer (CFO); the Program/Operations Committee, with four members, provides guidance to the Program Director; the Development Committee, with eight members, five of whom are board members, directs the philanthropic and development functions led by the Development Director; the Agency Relations Committee, with eight members, two of whom are board members, serves as an advisory forum for the Agency and Industry Relations Manager; and, finally, the Friend-Raising Committee, with eight members, supports the work of the Volunteer and Outreach Manager. These committees are linked to management functions (see the Share Food Organization Chart on page xii) and may contain volunteers who are not board members. The committees were formed to carry out the direction of the board, as cascaded through employees and volunteers, and typically have subcommittees themselves that are focused on specific SF objectives.

P.1b(2) SF’s key customers, stakeholders, and market segments are shown in Figure P1-4, along with their requirements and expectations. SF’s member agencies are stable, but their client base of food-insecure individuals and households is constantly shifting as jobs come and go and other resources become available. Different agencies also have different clients. For example, Wellness-Base focuses on providing congregate meals (i.e., nutritional meals served in a group setting) to children during the summer months. SeniorApproach coordinates lunch programs for the elderly at community centers and home delivery in the four urban counties of Des Couers, Knowles, Bountiful, and Peaceful. And Assist Each Other works in rural areas, primarily with migrant populations. Different food-insecure clients impact the member agencies’ needs for SF resources.

The Des Couers metropolitan statistical area (MSA) population of nearly 500,000 has been relatively stable over the last 10–15 years. Although some residents have moved into the cities, more urban residents have moved to the surrounding areas. Overall, of the Des Couers MSA population, some 8 percent are under age five, and 13 percent are over age 65. Most of the children live within the city, while a majority of the elderly remain in the more rural areas. Approximately 50,000 people (10 percent) of this heartland MSA live below the federally established poverty rate. Of the 75,000 food-insecure client contacts to SF’s member agencies in 2006, a small number (<5,000) were to individuals who are perennially in need and make frequent use of agency services. Most clients access member agencies on a temporary
basis to supplement other sources of food or to bridge a temporary gap between jobs. This unpredictability requires close collaboration among SF and its member agencies.

Nearly two-thirds of food-insecure households represented by member agencies have incomes under the federal poverty level. Almost one-third receive food stamps and/or other assistance such as the Supplemental Nutrition Program for Women, Infants, and Children (WIC).

**P.1b(3)** SF could not carry out its mission without the extraordinary service and support received from suppliers and partners, which it segments by food, finances, or services (Figure P.1-5). Since SF is the beneficiary of so many organizations, it works hard to meet the needs and preferences of all suppliers (also called donors) and treats them as partners in the effort to reduce the impact of hunger on SF’s communities.

SF’s most important supply chain requirements vary for intake and distribution processes. For intake, SF has suppliers who are regular (daily or weekly) contributors to the food bank and others who are episodic. All must conform to food safety requirements. If a supplier delivers food that does not conform to food safety requirements or does not have nutritional value, SF informs the supplier that the food might not be usable without repackaging. A dialogue is continued with the supplier to ensure food quality. Depending on the frequency of supply and the scale of the supplier, SF takes on more of the responsibility for food safety control. Because collection is often administered by volunteers with limited time, it is important that food deliveries or pickups occur as scheduled.

**P.1b(4)** SF’s Agency and Industry Relations Manager, along with his volunteer advisory subcommittee, meets with each supplier at least twice a year. The subcommittee develops strategies to approach other organizations throughout the region. All suppliers are invited to an annual recognition event at which plaques are given to commemorate their involvement. The event also is a fundraiser and one of SF’s most successful events.

The Regional Network of Food Relief Agencies, which includes agencies that do not currently work with SF, meets twice a year to reflect on accomplishments and to encourage joint planning among member agencies. This informal gathering has been effective at heading off competitive initiatives, and SF takes back learnings and feedback. The network allows all regional agencies with elimination of hunger as their purpose to work together synergistically to benefit those in the most need.

### Organizational Challenges

**P.2 Organizational Challenges**

**P.2a(1)** SF’s competitive position is as one of the largest food banks in Iowa, and it is a member of the FBA, the Iowa Food Bank Association (IFBA), and the regional Food Bank Learning Collaborative (FBLC) (see Figure 7.3-8). Last year, SF distributed almost half of all food dispersed to those in need throughout Iowa. While the population of its service area has remained relatively stable, the food-insecurity rate for two of its six counties exceeds the state average of 9.5 percent. Demand for SF’s services has doubled in the last three years.

<table>
<thead>
<tr>
<th>Stakeholder Groups</th>
<th>Requirements</th>
<th>Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customers</strong></td>
<td>- Timeliness</td>
<td>- Continuity</td>
</tr>
<tr>
<td></td>
<td>- Quality/variety/quantity of food</td>
<td>- Dependability</td>
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<tr>
<td></td>
<td>- Competency/consistency</td>
<td></td>
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<tr>
<td></td>
<td>- Access to nutritional food (based on AAFNHA Nutrition Scale)</td>
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<tr>
<td></td>
<td>- Continuity of service</td>
<td></td>
</tr>
<tr>
<td><strong>Stakeholders</strong></td>
<td>- Accountability</td>
<td>- Resources get transported and distributed to intended locations</td>
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<tr>
<td></td>
<td>- Cost efficiency</td>
<td>- Recognition of efforts</td>
</tr>
<tr>
<td></td>
<td>- Administrative cost reduction</td>
<td>- Adhere to Iowa Charities Review and Iowa Council of Nonprofits accountability standards</td>
</tr>
<tr>
<td></td>
<td>- Dependability</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Flexibility</td>
<td></td>
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<tr>
<td><strong>Community Segments</strong></td>
<td>- Effective response to emergency needs</td>
<td>- Recognition of efforts</td>
</tr>
<tr>
<td></td>
<td>- Cost efficiency</td>
<td>- Resources get transported and distributed to intended locations</td>
</tr>
<tr>
<td></td>
<td>- Meaningful opportunities to serve</td>
<td>- Appreciation</td>
</tr>
<tr>
<td><strong>Donors/Suppliers (food, finances, services)</strong></td>
<td>- Accountability</td>
<td>- Recognition of efforts</td>
</tr>
<tr>
<td></td>
<td>- Impact and integrity</td>
<td>- Careful use of resources</td>
</tr>
<tr>
<td></td>
<td>- Single point of service for deliveries</td>
<td>- Resources get transported and distributed to intended locations</td>
</tr>
<tr>
<td></td>
<td>- Predictability of operations</td>
<td></td>
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<tr>
<td></td>
<td>- Coordinated management of donations</td>
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<tr>
<td></td>
<td>- Effective lead-time to meet requests</td>
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<tr>
<td></td>
<td>- Proper food storage</td>
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</tbody>
</table>
SF competes with several other social service organizations, such as Heroic Blood Donations and Conservancy Corps, for operating funds. At the same time, emergencies, disasters (e.g., the recent tornados that swept across the state), and the closing of the largest employer in the region require SF to collaborate with these organizations to provide essential disaster relief. An annual Community Needs Assessment completed by the Ways of Connection, a nonprofit umbrella organization, helps SF determine key collaborators. Figure P.1-5 lists key collaborators who also are considered partners.

P.2a(2) The principal factors that determine SF’s success relative to other food banks is its ability to feed the food-insecure through its member agencies, network of food suppliers, tight management of overhead costs, and volunteer base. Key changes taking place that affect SF’s competitive situation are listed in P.1b(2).

SF takes pride in the tight management of its overhead costs, which represent 12.1 percent (fund development plus general administrative overhead, see Figure P.1-1) of its total operating expenses. An opportunity for innovation and collaboration to meet the strategic challenge of obtaining and maintaining financial resources occurred in 2001, when SF worked with local corporations to underwrite all indirect costs, including overhead, and developed a Corporate Contributor Program. With this program, SF can state in its fundraising efforts that 100 percent of unrestricted funds go directly for food and services to feed those who are hungry. SF’s key success factors are shown in Figure 4.1-1.

Figure P.1-5 Key Suppliers/Partners/Collaborators (complete list available on site)

<table>
<thead>
<tr>
<th>Suppliers/Partners</th>
<th>Operational Role (Work Systems, Production, and Delivery)</th>
<th>Innovation Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>Collaborate to provide food that SF uses to carry out its mission. Donate food and facilitate collection process.</td>
<td>Broaden the reach of SF to other member agencies. Provide continuous improvement in core processes.</td>
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<tr>
<td>• Regional food</td>
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<tr>
<td>• manufacturing,</td>
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<tr>
<td>• processing, and</td>
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<td>• packaging facilities</td>
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<td>• TEFAP</td>
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<tr>
<td>• Retail grocers</td>
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<tr>
<td>• Restaurants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Agriculture/farmers</td>
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<tr>
<td>Finances and Services</td>
<td>Support SF by providing funds to purchase food and underwrite activities and/or by donating time,</td>
<td>Pull operations to new and appropriate capabilities as a condition of funding.</td>
</tr>
<tr>
<td>• Charitable foundations</td>
<td>by donating time, creativity, and other types of support.</td>
<td>Provide fiduciary controls/ oversight. Design and volunteer for exciting and</td>
</tr>
<tr>
<td>• Ways of Connection</td>
<td></td>
<td>rewarding events and campaigns.</td>
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<tr>
<td>• Corporate contributors</td>
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<tr>
<td>• Local courts</td>
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<tr>
<td>• Communities in six</td>
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<td></td>
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<tr>
<td>• Iowa counties</td>
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<td></td>
</tr>
<tr>
<td>• FBA, FBLC, IFBA</td>
<td></td>
<td></td>
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<tr>
<td>• Regional Network of</td>
<td></td>
<td></td>
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<tr>
<td>• Food Relief Agencies</td>
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<tr>
<td>• Federal, local, and</td>
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<tr>
<td>• state governments</td>
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<tr>
<td>• Community and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• business groups</td>
<td></td>
<td></td>
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<tr>
<td>• Taxpayers</td>
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</table>

P.2a(3) SF utilizes comparative and competitive data from a variety of sources, including national comparisons with the FBA and state comparisons with the IFBA. Assistance Now Finder, one of the nation’s largest independent charity evaluators, provides free financial evaluations of food banks and other nonprofit organizations outside of the industry. In addition, SF has collaborated with seven food banks across its region of the United States to form the FBLC. These food banks have agreed to share performance data and best practices and to work together to solve problems.

Given the limited resources of most food banks, challenges associated with acquiring and using benchmark data include incomplete or old data, time lags from state and federal sources, and inconsistencies in tracking and reporting systems, as well as time lags resulting from manual data entry by volunteers. SF is able to track and analyze data with the help of DU students and fellows.

P.2b Meeting its mission of feeding the hungry and its vision for a hunger-free Iowa, SF has identified the following key challenges:

1. Ensure that food reaches those most in need, when they need it most.
2. Optimize human resources and partnerships.
3. Respond to the needs of member agencies.
4. Obtain and maintain adequate financial resources.
5. Recruit volunteers from a broad range of age segments.

SF’s advantages associated with organizational sustainability are the principal factors listed in P.2a(2).

P.2c One key element of SF’s performance improvement system is the Plan-Do-Check-Act (PDCA) Process (Figure 6.1-3). The PDCA Process is part of new employee and volunteer orientation and fosters a spirit of ingenuity, learning, and acceptance of continuous improvement.

In 2000 a new board member introduced SF to the Baldrige framework, another key element of SF’s performance improvement system. Since that time, SF has conducted annual self-assessments based on the Criteria for Performance Excellence and in 2001 submitted a state-level application for external review and feedback. In 2005 SF received its state quality award; it was one of the first food banks in the country to receive such an honor.

To maintain an overall focus on performance improvement, on the important mission of the organization, and on the stakeholders it serves, SF holds quarterly debrief sessions with employees and volunteers during all shifts. Ideas and suggestions are captured for sharing and implementation, as appropriate.
1: Leadership

1.1 Senior Leadership

1.1a(1) Senior leaders updated SF’s mission, vision, and values (MVV) at a strategic planning retreat in 1997. Since that time, the Board of Directors has taken ownership of the vision, and SF’s senior leaders own the mission and values. In 1999 SF changed, combined, reduced, and added values, and in 2003 it revised the values again when it instituted a systematic process to deploy values to employees, volunteers, partners, suppliers, and member agencies.

SF always has deployed organizational values to employees and volunteers (the workforce) through orientation, role modeling, and its culture. A new process instituted in 2003 added additional volunteer orientation training, supported by a value prominently displayed on a daily basis in the food bank entrance. Senior leaders describe the value in terms of behaviors that could be used as volunteers go about their work. For example, “Careful use of resources” might involve a discussion of how driving the speed limit saves gas (SF fills the tanks of its vehicles and reimburses employees and volunteers who use their own vehicles for SF food pickups and deliveries) or how proper food storage reduces waste. Annually, representatives of SF’s member agencies are treated to a banquet where they receive a professional presentation by one of SF’s board members on the MVV. Banquet attendees are encouraged to take notes and leave comments and improvement suggestions. Reinforcing SF’s value of partnering and participation was suggested at one of these events and adopted by senior leaders soon after. Senior leaders deploy the vision and values to key suppliers, partners, customers, and other stakeholders through SF’s Web site, annual report, and newsletter Share Food for Thought.

Because SF is a small organization, leaders can effectively model their commitment to the values for employees and volunteers in personal, day-to-day interactions. Senior leaders’ personal actions reflect a commitment to the values. The Volunteer and Outreach Manager is frequently present when volunteers arrive, and, as she posts the value for the day, she engages them in ideas for other behaviors that link to the value. Last year, the Program Director/CFO noted that the drivers, who come and go by the back dock, were not benefiting from such discussions, so he started posting the value of the day in the break room. He or another senior leader goes to the break room at least once each day to post and discuss a SF value and what it means. In addition, one senior leader each day completes a walk-around to engage in discussion with as many employees or volunteers as possible. These discussions typically last only a few minutes but serve multiple purposes:

- Provide a focus on SF values
- Allow for the gathering of employee/volunteer contributions to the meaning of the values
- Give opportunities to have two-way conversations with senior leaders on any subject

This practice has been so successful that it is now a part of the leadership process. If one senior leader is unable to post the daily value, one of the others fills in for him or her. Volunteers especially notice and appreciate leadership’s accessibility as a result of this practice. It takes very little time and heads off problems and issues before they can get blown out of proportion.

1.1a(2) In conjunction with a professor at Des Couers University (DU), SF’s Executive Director teaches a course on ethical business practices. She also is a charter member of Industry Ethics & Standards (IES), a national, nonprofit group that promotes ethical values in businesses and nonprofits. Each year, one U.S. business and one U.S. nonprofit receive the highly coveted IES Award for emulating the highest ethical conduct. This group also hosts quarterly roundtables to develop and refine ethical conduct in various situations, and it provides a survey free of charge to any organization that is interested. The last roundtable had record attendance with a keynote speaker from a food bank who talked about looting and other illegal activities that occurred in the wake of Hurricane Katrina in 2005. Because SF’s Executive Director is widely acknowledged as a community leader in ethics, she sets a high standard for other senior leaders, employees, and volunteers. In fact, many volunteers have stated that they were initially attracted to SF because of hearing or seeing her speak on ethics.

In addition, SF’s senior leaders seek opportunities to personally promote and reinforce ethical considerations in the organizational environment among employees, volunteers, partners, and other stakeholder groups through presentations, written communication, and role modeling.

1.1a(3) SF creates a sustainable organization through wise financial stewardship, strong partner relationships, and employee and volunteer development. By keeping a continuous focus on feeding the hungry in a manner that dignifies those in need and uses resources efficiently and effectively, SF continues to be a significant force in its six-county service area. Thanks to the innovative Corporate Contributor Program, established in 2001, with several key donor organizations agreeing to fund general administrative overhead expenses, SF can deliver on its promise to use 100 percent of donations to feed the hungry. This is not only an important tool for fundraising, but it also provides SF the ability to operate without fear of “going out of business.” The Corporate Contributor Program is an example of the role model performance leadership at SF. Other food banks have considered this program a best practice and adopted it.

An environment for organizational performance improvement, innovation, and agility is created through partnerships not generally associated with a food bank. In addition to fellows from government agencies and foundations, SF’s employees and volunteers utilize DU students who need to fulfill a community stewardship requirement to complete studies and projects. SF also collaborates with DU to provide an internship position for warehousing. For
example, a recent rehabilitation of the warehouse was the culmination of a year-long project with students to improve safety and reduce the turnaround time of nonperishable food.

SF’s senior leaders create an environment for accomplishing the organization’s mission and strategic objectives by serving as champions of each strategic objective. As described in Figure 2.1-3, SF has four strategic objectives, which are monitored by board committees. Each of the four key senior leaders takes responsibility for one and, as the champion of the objective, forms an interlocking team to develop action plans and carry out implementation. Each team must have at least one employee and one volunteer. Team members are invited to attend board meetings when their objective is being discussed. Through this process, called the Leadership System Model, employees and volunteers can see the importance afforded, at all levels, to the SF mission and strategies. This model, shown in Figure 1.1-1, provides organizational and individual learning and knowledge sharing across all functions.

Organizational and workforce learning are fostered through an environment that values what each person brings to the table. Because SF is so small, volunteers, including students and fellows with a wide range of knowledge and skills, are recruited to augment SF’s employees. Just because a volunteer initially contributes only to an annual food drive, SF does not see him or her only in that role. Open positions for paid employees and core volunteers are posted in the break room and in the monthly newsletter Share Food for Thought. If someone can only contribute a limited amount of time, SF tries to document procedures that capture his or her expertise so everyone can benefit.

To prepare for a sudden departure of a key person, the Board of Directors developed a succession plan in 2003 that identifies the order of succession of current leaders. To make succession successful, the board took on the responsibility, including training and mentoring, of developing future leaders at SF. In addition, employees are often asked to make presentations to board committees, which furthers their abilities to communicate clearly and concisely. One part of the succession plan has been to conduct limited job rotation among senior leaders. In 2004 each of the four key senior leaders spent time fulfilling the role of the Executive Director, supervised by the current Executive Director. In 2005 each senior leader rotated into another’s position for one week.

1.1b(1) SF communicates with and engages the workforce using the methods shown in Figure 1.1-2.

Frank, two-way communication is achieved through daily interaction with employees and volunteers, as described in 1.1a(1) and Figure 1.1-2. In addition, the Leadership System Model provides for regular analysis and review of performance, and these interactions are always conducted to encourage a rich exchange of information and ideas. The interlocking committees and teams are another forum for two-way sharing. All of these communication methods contribute to aligning the organization in order to be most effective in mission performance. Senior leaders also communicate key decisions through these interlocking committees and teams.

Employee and volunteer reward and recognition for high performance are ongoing and significant parts of SF’s culture. SF has two major categories of recognition: individual and team. For each, there is monthly, quarterly, and annual recognition. The recognized individual and team (V-team) are highlighted in a special display in the SF front lobby, across from the Donor Wall of Honor. In addition, the monthly and quarterly recipients

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**Figure 1.1-1 Leadership System Model**

- **BOD**
  - Vision
  - Policy
  - Key Success Factors
  - Key Financial Measures
  - Oversight of Budget and Expenses
  - Monitoring of Strategic Objectives

- **Senior Leaders**
  - Mission and Values (daily)
  - Strategic Objectives and Action Plans
  - Processes and Procedures
  - Performance Improvement

- **Interlocking Committees**

- **Interlocking Teams**
  - Employees and Volunteers
    - Values as Behaviors
    - Implementation of MVV
    - Daily Operations
    - Customer/Partnering Listening Posts
    - Process Improvement

**D=Daily, W=Weekly, M=Monthly, Q=Quarterly, A=Annually**
Figure 1.1-2 Methods to Communicate, Empower, and Motivate

| Communicate | • Daily walk-arounds  
|            | • Posting of the values  
|            | • Weekly e-mail from the Executive Director  
|            | • Monthly Share Food for Thought newsletter  
|            | • Annual evaluation  
|            | • Recognition and appreciation events  
|            | • Quarterly brown-bag debriefings  

| Empower    | • Posting of position descriptions  
|           | • Cross-training  
|           | • Decisions and actions are a part of the MVV  
|           | • Interlocking teams  
|           | • Leadership Development Program (LDP)  

| Motivate   | • Timely training  
|           | • Tools to do the job  
|           | • Recognition and appreciation events  
|           | • Internal promotions (employees and volunteers)  

are highlighted in the newsletter Share Food for Thought and are recognized at an annual banquet, where the individual and V-team of the year are announced with much fanfare and suspense. An example of a recent monthly V-team award was the work of SF’s Food Donation Team. Learning from some of SF’s member agencies serving urban counties that they lacked fresh fruits and vegetables, the Food Donation Team worked with community gardens, garden clubs, and local orchards and farmers to obtain fresh produce items. In addition to responding to the request with a seasonal supply of high-quality, nutritional food, the team documented a cost savings as new food donors were found and new relationships were built. A Des Couers County Home Extension economist heard about the effort, and the Extension’s Master Gardener Program members have offered to “adopt” the fresh produce initiative as an ongoing service project.

The special lobby display, newsletter recognition, and annual banquet are ways that senior leaders take an active role in reward and recognition programs to reinforce high performance and a customer and business focus. Senior leaders informally recognize employees and volunteers for exceptional customer service at any time that it occurs. Corporate contributors donate small gift items for this purpose.

1.1b(2) SF’s senior leaders create a focus on action to accomplish objectives, improve performance, and attain SF’s vision through the Leadership System Model (Figure 1.1-1). Each leader is responsible to a board committee for his or her assigned strategic objective, and the interlocking team structure provides every employee the opportunity to be on a team. Although fewer volunteers participate on teams, they still have the opportunity to contribute. SF’s MVV is posted for volunteers’ comments, and employees interact with volunteers on a daily basis.

SF improves its performance by establishing measures that are aligned to key objectives and by collecting and reviewing performance to targets on a frequent basis. Frequency is determined by importance, variability, and cycle time. For example, core volunteer hours are monitored on a monthly basis because the number of volunteer hours is critical to the delivery of services (see Figure 7.4-11). SF conducts one large fundraising campaign per year, along with a number of fund and/or food donation campaigns, usually conducted through corporate partners. In addition, SF builds events around FBA and IFBA activities, local celebrities and sports teams, and ongoing lower-key philanthropic initiatives. Donated funds are reviewed on a quarterly basis. When a target is not met, individual or team action is required using the PDCA Process (Figure 6.1-3).

The innovative incorporation of a community needs “check” ensures that senior leaders include a focus on creating and balancing value for SF’s member agencies and other stakeholders. For example, the fresh produce items mentioned above came about as a result of one of SF’s teams wanting to improve customization to member agency needs and to reduce cost. The “check” found that agency clients preferred different food, and some, such as fresh produce, were available at little cost. Ultimately, because SF strives to be responsive to its agencies and their communities, it was able to secure new donors for these and other items at low or no cost. Delivering value for member agencies and donor partners was achieved.

1.2 Governance and Social Responsibilities

1.2a(1) SF’s overall emphasis on business ethics embodies all areas of accountability, transparency, and protection of stakeholder interests. How SF reviews and achieves key aspects of its governance system is shown in Figure 1.2-1.

SF’s current board members include a representative of the Corporate Contributor Program, a partner of a leading certified public accountant (CPA) firm, two donor/supplier representatives, two member agency representatives, the Chief Executive Officer (CEO) of the local Heroic Blood Donations chapter, the Des Couers County public health officer, one client representative (i.e., someone who uses the services of SF’s member agencies), a banker, and a volunteer representative. Although board bylaws do not specifically require this breadth of representation, SF feels that this broad cross section of its communities provides a balanced view of changing community needs, as well as rich management expertise for SF.

1.2a(2) The performance of SF’s Executive Director is evaluated by the board, by senior leaders, by two employees and volunteers, and by executives of two member agencies. She in turn evaluates the four other senior leaders, who collectively evaluate all other employees and core volunteers. Key components of all senior leader evaluations include accomplishment of strategic objectives and personal development/professional achievement goals. The board conducts an annual self-evaluation, which is reviewed for improvement opportunities. For example, in 2004, the board realized that it was not highly engaged in the strategic objectives. It decided that the existing committee structure could be improved by linking strategic responsibilities, thus creating the interlocking Leadership System Model shown in Figure 1.1-1.

1.2b(1) The adverse impacts on society of SF’s operations have to do with food handling (improper storage at SF or member agencies), the lack of food of adequate nutritional value, and
transportation of food to and from the warehouse. SF anticipates public concerns and prepares for them by conducting informational campaigns and open houses to inform the community of its mission and operations, as well as ways community members can assist. SF also works with member agencies to improve food storage practices and workplace safety. As an example of proper food handling and storage, SF follows the theory “first in, first out.”

SF operates in a highly regulated environment and consistently achieves goals and targets year after year. Its goal is to surpass every criterion and exceed regulatory requirements. Key compliance measures are shown in Figure P1-3.

1.2b(2) SF promotes and ensures ethical behavior for all employees, volunteers, and board members through a culture of high standards set by its senior leaders. Values are based on ethics and are deployed as described in 1.1a(1). The employee appraisal form includes the values, and supervisors must rate each employee on his or her adherence to them. Employees and volunteers are required to use the values in decision making, which helps to reinforce them throughout the organization. In addition to volunteer orientation, volunteers are encouraged to attend new employee orientation, where ethical behavior is thoroughly discussed. Volunteers are asked to complete a very short, innovative, annual self-assessment that includes ethical conduct measures. While this tool is not used in any punitive way, it does provide a systematic process to review conduct and expectations.

In addition to appraisals, SF monitors and measures ethical behavior by its board members, employees, and volunteers through calls to an anonymous ethics hotline. Community volunteers, some of whom also volunteer for SF in other ways, staff the hotline. SF worked with DU to create the hotline, which can be used by any area government agency, nonprofit organization, community member, or small business, in addition to SF board members, employees, and volunteers. SF’s employees and volunteers were instrumental in bringing the funding and concept of this hotline to Des Couers County and in 2004 succeeded in getting a toll-free 800 number for use in surrounding areas.

SF responds to potential breaches of ethics by addressing them in the Finance/Audit or Program/Operations Committees, as appropriate. In the past five years, SF received only three hotline calls and investigated each one (see Figure 7.6-4). In every case, no ethical violation was found, although a potential conflict of interest was addressed by assigning a volunteer to a different position.

1.2c SF supports the community through education (see Figure 3.1-2) about the hungry and food-insecure throughout its service area. It believes that its volunteer opportunities also are valuable to strengthening overall citizenship within its communities. SF’s Leadership Development Program (LDP), created as both a volunteer recruitment and employee/volunteer development tool, is one way SF has cemented relationships with other community nonprofits. Representatives from member agencies (see Figure 7.1-12) and other area nonprofits may participate in the LDP. The relationships developed through this program have helped form a cohesive service delivery network for the area’s at-risk populations, providing hungry Iowans with needed services.

Occasionally, volunteers move to one of SF’s member agencies or another agency. SF does not see this as a net loss. Rather, the organization is proud to train and develop volunteers, who may go on to serve other needs within the community.

All SF employees give generously to the community of their time, talent, and money. Employees are encouraged to actively participate in local, regional, and national charities and associations and are provided time off to do so. One professional membership per employee is funded out of the Corporate Contributor Program funding. Figure 1.2-2 summarizes some of the many ways in which SF’s senior leaders and workforce contribute.

Key communities are determined by the main geographic areas in which SF operates (in order of importance): Des Couers City, Des Couers County, and five contiguous counties. Areas for involvement are primarily linked to food or causes of hunger, but these factors are interpreted broadly. SF also is part of a coalition of community-based nonprofit organizations that collaborate to provide safety-net services with continuity (FEED, see page 5).
SF’s employees also work with area community-health agencies, health care providers, and member agencies to deliver nutrition information and advice to the food-insecure. Member agencies and volunteers provide nutritional guidance and dietary expertise to SF.

SF is an active participant in Iowa’s Food as an Economic Engine for Development Partnership (FEED), which is a direct link to its mission (see Figure 7.6-15). The partnership enables local communities to add food-based businesses such as supermarkets, grocery stores, and farmers’ markets to their economic base, thus providing low-income and food-insecure households with access to grocery and produce items. This is especially important in low-income neighborhoods, where many families had been forced to rely on higher-priced gas stations or convenience stores for groceries. SF’s Executive Director serves on the FEED Iowa Partnership Board.

SF also supports key communities by providing placement for people with court-ordered community-service sentences. In addition, it works with a local community-supported agriculture (CSA) program to accept excess harvests into the distribution channels.

### Figure 1.2-2 Community Contributions of SF’s Senior Leaders and Workforce

<table>
<thead>
<tr>
<th>Workforce</th>
<th>Community Outreach Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Director</td>
<td>• National speaker on ethics</td>
</tr>
<tr>
<td></td>
<td>• DU faculty member</td>
</tr>
<tr>
<td></td>
<td>• Charter member of IES</td>
</tr>
<tr>
<td></td>
<td>• Greater Des Couers Chamber of Commerce member</td>
</tr>
<tr>
<td></td>
<td>• Board member of FEED Iowa Partnership</td>
</tr>
<tr>
<td></td>
<td>• Former board member of United Grocers Group of Iowa</td>
</tr>
<tr>
<td>Volunteer &amp; Outreach Manager</td>
<td>• Volunteer orientation trainer</td>
</tr>
<tr>
<td></td>
<td>• Harmony Helps volunteer</td>
</tr>
<tr>
<td></td>
<td>• Rison County School District volunteer</td>
</tr>
<tr>
<td></td>
<td>• Iowa Council of Nonprofits member</td>
</tr>
<tr>
<td>Agency &amp; Industry Relations Manager</td>
<td>• FEED Iowa Partnership member</td>
</tr>
<tr>
<td></td>
<td>• Conservancy Corps volunteer</td>
</tr>
<tr>
<td>Development Director</td>
<td>• World Unity Relief volunteer</td>
</tr>
<tr>
<td></td>
<td>• Philanthropic Association of Fundraisers member</td>
</tr>
<tr>
<td></td>
<td>• Bountiful County Community Action Coalition advisory member</td>
</tr>
<tr>
<td>Program Director/ CFO</td>
<td>• U.S. Excellence and Quality Group</td>
</tr>
<tr>
<td></td>
<td>• Mercy Cross Hospital volunteer</td>
</tr>
<tr>
<td></td>
<td>• Volunteer mediator</td>
</tr>
<tr>
<td>All</td>
<td>• Volunteers at local schools, churches, and civic events</td>
</tr>
<tr>
<td></td>
<td>• Ways of Connection donors</td>
</tr>
</tbody>
</table>

### 2: Strategic Planning

#### 2.1 Strategy Development

2.1a(1) SF conducts a 12-step, biennial Strategic Planning Process (SPP) (see Figure 2.1-1 for key process steps), which is facilitated by senior leaders and owned by board members. Other key participants include community leaders, volunteers, member agency representatives, and donor representatives. The SPP is conducted on even years (e.g., 2004, 2006, 2008). As SF is a small, nonprofit organization—and because time is a valuable resource for employees, board members, and stakeholders—SF has found that a biennial process addresses the organization’s strategic needs relative to its stakeholders, including member agencies, donors, regulatory bodies, and the communities that it serves.

SF initiated its SPP in 1997; however, a more systematic approach began in 2004 as a result of the insights gained from Baldrige-based self-assessments. These demonstrated a need to restructure the process to be more methodical and integrated. SF’s board redesigned the process to involve its key stakeholders, in addition to the board members, in a two-day planning retreat in December when strategies for the future are developed. All employees of SF are involved, and representatives from each of its member agencies also are invited.

The SPP is a result of benchmarking many nonprofit organizations, including other food banks, universities, and charities. In addition, feedback from the state-award process continues to improve SF’s strategic planning. For example, in 2005, SF added the biennial Environmental Scan that is completed during the off years of strategic planning. This biennial scan analyzes the internal and external environments that influence SF’s operations through a SF-defined minimum data set that evaluates changes in the following: communities that SF serves, regulatory bodies, corporate contributors or donors, capital issues related to SF’s infrastructure, and SF’s leadership. The biennial Environmental Scan is conducted as part of a normal board agenda in December. Senior leaders and board members evaluate items within the minimum data set that trigger the need to adjust the existing Strategic Plan and/or action plans. The Executive Director reviews an annual Community Needs Assessment, which is developed by the Ways of Connection, to guide the MVV discussion (see step two of the SPP).

SF’s SPP identifies potential blind spots through several methods. First, blind spots are identified with the use of a SWOT Analysis, the comprehensive biennial Environmental Scan, and performance analysis. Second, the data collected and analyzed in Figure 2.1-2 provide additional support to minimize potential blind spots. The data and information are collected and analyzed by
SF’s senior leaders and are presented to the board and other stakeholders. Concerns are identified during step three of the SPP and at quarterly board meetings, with a Strategic Plan update being a routine part of the agenda. Third, the listening and learning methods (needs determination methods) shown in Figure 3.1-1 provide additional approaches for SF to identify potential blind spots in planning through input from its various stakeholder segments.

Strategic challenges and advantages are developed in steps two through six of the SPP. The SWOT Analysis and Environmental Scan identify shifting trends and issues, and a review of funding mandates and a “Current State” performance analysis help SF determine its strategic challenges (as identified in P.2b). The “Future State” brainstorming in step six of the SPP helps SF determine its strategic advantages that lead it toward its vision of a hunger-free Iowa heartland.

Figure 2.1-1 Strategic Planning Process (continued on page 7)

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Step</th>
<th>Details of Process Steps</th>
<th>Participants</th>
<th>Calendar Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Preparation</td>
<td>To provide a disciplined approach to strategic planning, a writer and facilitator are selected. The writer is selected from employees or volunteers. Basic responsibilities of the writer include attending all of the planning meetings, gathering the information and data developed in the process, and writing a draft document that is presented to board members in step ten. The facilitator is selected from the board or community leadership and is responsible for deploying an effective process.</td>
<td>Executive Director and Board Chair</td>
<td>November</td>
</tr>
<tr>
<td>2</td>
<td>MVV</td>
<td>The Retreat Committee reviews the MVV. The Executive Director reviews the annual Community Needs Assessment (developed by the Ways of Connection), which guides the MVV discussion. An abbreviated version of the “hedgehog concept” (see Glossary) is used to gather participants’ perceptions of the organization, SF’s most passionately held values, and areas in which it excels (its strategic advantages). Resource drivers are examined and updated.</td>
<td>Retreat Committee: Senior Leaders, Board Committee Chairs, a Member Agency Representative, Community Leadership, a Volunteer, and a Donor Representative</td>
<td>December (Two-day retreat)</td>
</tr>
<tr>
<td>3</td>
<td>SWOT Analysis and Environmental Scan</td>
<td>The Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis is the central method used in this step. The SWOT ensures that the SPP addresses and analyzes data and information relative to the organization’s operations (e.g., state award feedback reports); shifts in the economic, legal, political, market, and competitive environments (e.g., customer satisfaction surveys); and regulatory issues and changes in technologies (e.g., new regulatory issues relative to U.S. nutritional guidelines). Potential blind spots are identified. The facilitator works with the Retreat Committee to prioritize the information generated by the SWOT through a consensus-building, multivoting technique.</td>
<td>Retreat Committee</td>
<td>December (Two-day retreat)</td>
</tr>
<tr>
<td>4</td>
<td>Review of Funding Mandates</td>
<td>This step is a review of the mandates that may exist from SF’s corporate contributors, donors, and regulating bodies. Mandates considered are those whose scope and severity are such that not meeting them may affect SF’s funding, reimbursement, and subsequently its ability to sustain operations.</td>
<td>Executive Director, Senior Leaders, Retreat Committee</td>
<td>December (Two-day retreat)</td>
</tr>
<tr>
<td>5</td>
<td>“Current State” Performance Analysis</td>
<td>Utilizing SF’s Balanced Plate Scorecard (Figure 4.1-1), a performance analysis is conducted by the Retreat Committee. Using the priorities established in the SWOT, SF identifies and lists gaps in current performance.</td>
<td>Retreat Committee</td>
<td>December (Two-day retreat)</td>
</tr>
<tr>
<td>6</td>
<td>“Future State” Brainstorming</td>
<td>In this step, using the information and data gathered in the previous two steps, appreciative inquiry (AI) is used to develop the “Future State” of the organization. The Retreat Committee identifies the best times during the best circumstances in SF’s past, assesses what worked best then, and envisions what the committee wants in the “Future State.” The committee then constructs a plan to work toward SF’s overall vision of a hunger-free Iowa heartland. Ideas and projections are grouped using affinity diagramming. This step is where the Retreat Committee’s job ends.</td>
<td>Retreat Committee</td>
<td>December (Two-day retreat)</td>
</tr>
</tbody>
</table>
There are two planning horizons relative to the SPP. The short-term horizon is one to two years and was chosen to align with SF’s strategic planning cycle, fiscal year, and grant cycles. This allows for the allocation of resources to achieve the Strategic Plan objectives, as well as daily operations. Research through the Iowa Council of Nonprofits helped to guide SF to a long-term planning horizon of three to five years. SF uses three years to gauge the strategic planning goals related to programming and to address changes in the political, economic, or regulatory environments. Goals related to capital planning (e.g., the physical plant) utilize a time horizon of five years. Step seven of the SPP incorporates these horizons as strategic objectives, goals, and time frames are developed. The strategic objectives and related goals are displayed in Figure 2.2-2.

2.1a(2) To help ensure that SF’s SPP addresses the key factors outlined in Figure 2.1-2, senior leaders are held accountable to routinely review the data and information sources that influence SF’s planning and operations. Senior leaders answer to individual board committees as demonstrated in Figure 2.1-2. Updates or summaries of these sources of information and data are presented at each of the board committee meetings, as needed. Further, the goal of SF’s current Executive Director is to educate and increase the knowledge base of the board members relative to food banks. One method used to achieve this is through the senior leaders, who are responsible for providing educational sessions to the board on the food bank industry, with a focus on factors that affect SF and its member agencies. Many of the sources contained in Figure 2.1-2 provide the resources for these educational sessions. In addition, the Executive Director periodically provides an executive summary of these data and information sources for the board and donor base. These summaries are deployed by e-mail or through mailed board agendas. The annual Community Needs Assessment and biennial Environmental Scan also assist in furthering the collection and analysis of these key factors.

2.1b(1) The key strategic objectives and timetables for accomplishing them are displayed in Figure 2.2-2. In addition, Figure

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**Figure 2.1-1 Strategic Planning Process (continued from page 6)**

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Step</th>
<th>Details of Process Steps</th>
<th>Participants</th>
<th>Calendar Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Development of Strategic Objectives, Goals, and Time Frames</td>
<td>At a separately scheduled session, the senior leaders and board committee chairs meet to establish strategic objectives, along with key indicators, goals, and time frames required to support the achievement of the objectives. This executive planning session uses the information gathered in steps three through six, and the MVV is kept at the center of this step. Throughout the development of the objectives and goals, SF’s senior leaders ensure that actions are consistent with the MVV. The facilitator’s job is to maintain consensus and alignment with the MVV. In addition, during this step, priorities for breakthrough improvement are identified.</td>
<td>Senior Leaders, Board Committee Chairs</td>
<td>December</td>
</tr>
<tr>
<td>8</td>
<td>Resource Allocation</td>
<td>The Executive Director, with assistance from the senior leaders, develops the annual fiscal and capital budgets to support the objectives and goals established in step seven. The Finance/Audit Committee reviews the budgets and an outline of resources needed to support the Strategic Plan. Resources are allocated through a recommendation for action by the Finance/Audit Committee, and the budgets are presented to the entire board in February.</td>
<td>Senior Leaders and Board</td>
<td>January</td>
</tr>
<tr>
<td>9</td>
<td>Action Planning</td>
<td>Action plans are developed to support the success of the strategic objectives. The PDCA Process (Figure 6.1-3) is used to develop the plans. SF employees and Des Couers community leaders, who also serve as SF volunteers, are assigned specific action plans to champion. Each action plan and champion is assigned to a committee of the board for oversight and accountability. In addition, comparative data to measure performance are selected.</td>
<td>Senior Leaders, Employees, Community and Volunteer Leadership</td>
<td>February</td>
</tr>
<tr>
<td>10</td>
<td>Board Approval</td>
<td>The Strategic Plan, resource outline, and action plans, along with the annual fiscal and capital budgets, are presented to the entire board for approval.</td>
<td>Senior Leaders and Board</td>
<td>February</td>
</tr>
<tr>
<td>11</td>
<td>Strategic Plan and Action Plan Deployment</td>
<td>The action plans are deployed into all elements of SF through several communication methods (see Figure 3.1-2).</td>
<td>All Employees and Volunteers</td>
<td>January–February</td>
</tr>
<tr>
<td>12</td>
<td>Strategic Plan Monitoring</td>
<td>The Executive Director updates the board on the status of the Strategic Plan; this update is a regular part of the board’s agenda. The champions for action plans make quarterly reports to the committees of the board.</td>
<td>Senior Leadership</td>
<td>January–February</td>
</tr>
</tbody>
</table>
2.2-2 outlines the action plans, key indicators, and goals that are associated with SF’s strategic objectives.

2.1b(2) SF’s strategic objectives address its challenges and advantages. Figure 2.1-3 demonstrates how SF’s strategic objectives align with its challenges, values, key success factors, and key stakeholders. This alignment of strategic objectives offers SF opportunities to clearly see gaps and address any opportunities for product and service, operational, or business model innovation. As discussed earlier, SF uses an approach to strategic planning that keeps a focus on the MVV. This is demonstrated through several steps of the SPP, such as in steps two, seven, eleven, and twelve. This consistent focus on the MVV and initial involvement of key stakeholder representatives in the SPP ensures alignment between the strategic objectives and the strategic challenges and opportunities, as well as the needs of all key stakeholders.

2.2 Strategy Deployment

2.2a(1) Action plans are developed using the PDCA Process beginning in step nine of the SPP (Figure 2.1-1). SF uses champions to lead the development and organization-wide deployment of action plans, which come from several sources, such as its senior leaders, board, volunteer base, and LDP graduates. The board’s routine oversight at quarterly meetings ensures that the outcomes of action plans are sustained and achieve the strategic objectives.

2.2a(2) SF ensures that adequate financial and other resources are available to support the accomplishment of action plans in step eight of the SPP. Resources are allocated through steps eight and ten of the SPP in which the strategy that was developed in step seven is presented to the Finance/Audit Committee for review and then to the entire board for approval. Key changes resulting from the action plans are sustained through the board.

**Figure 2.1-2 SPP Key Factors and Analysis of Data and Information Sources**

<table>
<thead>
<tr>
<th>Strategic Planning Process Key Factors</th>
<th>Data and Information Sources Utilized</th>
<th>Data Collection &amp; Board Oversight</th>
<th>Process Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>SWOT</td>
<td>State-award feedback reports, board meetings, customer satisfaction surveys, point-of-service (POS) surveys, Assistance Now Finder, USDA Food Pyramid, Dietary Guidelines for Americans, AAFNHA Nutrition Scale (see Figure 7.1-5)</td>
<td>Retreat Committee</td>
<td>Step Three</td>
</tr>
<tr>
<td>Technology</td>
<td>FBA, IFBA, DU, FBLC</td>
<td>Program Director/CFO, Program/Operations Committee</td>
<td>Step Three</td>
</tr>
<tr>
<td>Regulatory</td>
<td>DHFS, OSHA, Consumer Health Care Aid Program (CHCAP), county FSP, NSLP, city/county/ federal agencies</td>
<td>Agency &amp; Industry Relations Manager, Finance/Audit Committee</td>
<td>Step Three</td>
</tr>
<tr>
<td>Market, Competition, and Customer Preferences</td>
<td>FBA 2006 Hunger Study, FBA Benchmark Survey of National Public Opinion, Community Progress Project (CPP), Interagency Council on Homelessness, customer satisfaction surveys, POS surveys, annual Community Needs Assessment</td>
<td>Development Director, Friend-Raising Committee</td>
<td>Steps Two and Three</td>
</tr>
<tr>
<td>Organizational Sustainability</td>
<td>Ways of Connection; Elie &amp; Jackson Research, <em>Food in Times of Crisis Study</em>; FBA and FBLC; TEFAP; the Commodity Supplemental Food Program (CSFP); Mayor’s National Databank on Hunger (MNDH)</td>
<td>Executive Director, Board of Directors</td>
<td>Steps Three and Five to Seven</td>
</tr>
<tr>
<td>Executing the Strategic Plan</td>
<td>Board reports at regularly scheduled meetings, Baldrige self-assessments</td>
<td>Designated Champions</td>
<td>Step Twelve</td>
</tr>
<tr>
<td>Labor Market; Legal, Political, and Economic Environment</td>
<td>U.S. Department of Labor job projections, state and regional labor market projections, county welfare utilization, Greater Des Couers Area Chamber of Commerce membership, the <em>Gonzalez Quarterly</em>, <em>Western Iowa Business Journal</em>’s annual business report, U.S. Census Bureau, USDA economic research</td>
<td>Agency &amp; Industry Relations Manager, Program/Operations Committee</td>
<td>Steps Three to Seven</td>
</tr>
<tr>
<td>Efficiency and Effectiveness Factors</td>
<td>Assistance Now Finder, FBA, Ways of Connection Outcome Measurement Resource Network</td>
<td>Executive Director, Board of Directors</td>
<td>Steps Three, Four, and Six</td>
</tr>
<tr>
<td>MVV</td>
<td>Assistance Now Finder, FBA, annual Community Needs Assessment, customer satisfaction surveys, Baldrige self-assessments</td>
<td>Board Chair, Board of Directors</td>
<td>Steps One, Two, and Twelve</td>
</tr>
<tr>
<td>Donor Participation/ Fundraising</td>
<td>Philanthropic Association of Fundraisers, Assistance Now Finder, annual Community Needs Assessment</td>
<td>Development Manager, Friend-Raising Committee</td>
<td>Steps Two, Seven, and Eight</td>
</tr>
<tr>
<td>Early Indications of Major Shifts in Key Factors</td>
<td>All of the above</td>
<td>Designated Champions</td>
<td>Step Twelve</td>
</tr>
</tbody>
</table>
The five committees within the Board of Directors assess the financial and other risks associated with action plans in step nine of the SPP. Each action plan is assigned a champion, who reports to the board committee for oversight and accountability in regards to financial and other risks. In step ten of the SPP, the full board must approve the resource outline and all action plans, ensuring there is a balance of resources to ensure adequate resources to meet current obligations.

The Executive Director updates the board regularly on the status of the Strategic Plan and key changes, as well as the action plans. These key changes are then monitored through the Balanced Plate Scorecard (Figure 4.1-1) in which many of the key measures originate from the SPP. SF further ensures that key changes from the planning process are sustained through the Performance Review System (Figure 4.1-2). This well-integrated and deployed system uses six approaches that communicate and review performance at varying frequencies throughout the year.

2.2a(3) Operating a biennial SPP requires SF to be able to rapidly modify and diffuse action plans if emerging circumstances require a shift in planning. SF uses two more systematic methods to establish and modify action plans. One method that addresses the shift in plans is the biennial Environmental Scan, which occurs on the off years of SF’s SPP. As discussed in 2.1a(1), this scan utilizes a minimum data set to determine if plans require modification. The board, along with the senior leaders, works through the board committee structure to establish appropriate plans, with deployment turned over to a senior leader. Action plans are deployed through the communication methods shown in Figure 3.1-2.

An additional method SF uses is the Emergent Strategy Alert Process (Figure 2.2-1), which was implemented by a team of SF senior leaders and volunteers in response to unanticipated community layoffs due to extreme drought conditions affecting a large regional employer and food supplier in Bountiful County several years ago. The Emergent Strategy Alert Process empowers the person leading an action plan (champion) to take the initiative as his or her analysis deems appropriate and to rapidly deploy modified action plans. The Emergent Strategy Alert is used for strategies, goals, or actions that were not recognized in the original SPP. It allows for rapid reprioritization of the key factors that influence or impact the organization and have changed since the original planning process. The Emergent Strategy Alert Process guides SF through the adaptation, establishment, and modification of action plans, as required by current circumstances.

2.2a(4) Key short- and long-term action plans are outlined in Figure 2.2-2. The key planned changes in products and services for this fiscal year (not included in Figure 2.2-2) are as follows:

- Increase the variety of nutritional food offered to member agencies to reflect the Dietary Guidelines for Americans, 2005
- Look for innovative ways to implement the Internet as a mechanism to promote communication throughout the organization

<table>
<thead>
<tr>
<th>Figure 2.1-3 Strategic Objectives Aligned With Strategic Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic Objectives</strong></td>
</tr>
<tr>
<td>-------------------------</td>
</tr>
<tr>
<td>Increase the amount and quality of food delivered</td>
</tr>
<tr>
<td>Increase SF’s organizational and resource capacity</td>
</tr>
<tr>
<td>Develop a media and marketing strategy that makes the public more aware of hunger in its communities</td>
</tr>
<tr>
<td>Participate with state and county emergency-response activities to meet the emergency and seasonal food needs of the community, as well as those at greatest risk: seniors and children</td>
</tr>
</tbody>
</table>

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The five committees within the Board of Directors assess the financial and other risks associated with action plans in step nine of the SPP. Each action plan is assigned a champion, who reports to the board committee for oversight and accountability in regards to financial and other risks. In step ten of the SPP, the full board must approve the resource outline and all action plans, ensuring there is a balance of resources to ensure adequate resources to meet current obligations.

The Executive Director updates the board regularly on the status of the Strategic Plan and key changes, as well as the action plans. These key changes are then monitored through the Balanced Plate Scorecard (Figure 4.1-1) in which many of the key measures originate from the SPP. SF further ensures that key changes from the planning process are sustained through the Performance Review System (Figure 4.1-2). This well-integrated and deployed system uses six approaches that communicate and review performance at varying frequencies throughout the year.

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<table>
<thead>
<tr>
<th>Figure 2.2-1 Emergent Strategy Alert Process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Steps</strong></td>
</tr>
</tbody>
</table>
## Figure 2.2-2 Strategic Objectives, Action Plans, and Goals

<table>
<thead>
<tr>
<th>Strategic Objectives and Goals</th>
<th>Action Plans (short term [ST] and long term [LT])</th>
<th>Key Indicators</th>
</tr>
</thead>
</table>
| Increase SF’s organizational and resource capacity  
a. Grow primary revenue and support by 5 percent by FY2007  
b. Increase number of corporate contributors by ten to continue to offset overhead expenses, with the goal of increasing the number of contributors to increase the monetary support of SF | **ST:** Design and deploy efficient processes to achieve efficiency score of 37.5; capacity score of 17.5; and overall score of 54+ by FY2007 *(Figures 7.3-1–7.3-3)*  
**LT:** Achieve efficiency of >37.5; capacity of >22.5; and overall of >60 | Assistance Now Finder Rating (annual) |
|  | **ST:** Develop training and learning initiatives to retain employees and volunteers and support growth *(Figure 7.4-3)*  
**LT:** Enhance employee and volunteer training to manage the increased technical demands of operations *(Figures 7.4-1, 7.4-2)* | “Overall Satisfaction” and “Likelihood to Refer” answered in surveys |
|  | **ST and LT:** Grow primary revenue and support by 5% by FY2010 *(Figure 7.3-1)* | Primary revenue growth (Assistance Now Finder) |
|  | **ST and LT:** Develop plan to increase volunteers’ hours by 10% each year through FY2010 | Total hours volunteered (FBLC comparisons) |
|  | **ST and LT:** Develop plan to increase employee and volunteer retention by 5% each year *(Figure 7.4-6)* | % retained for one year or greater |
|  | **LT:** Increase corporate contributors to ten to reduce overhead expenses *(Figures 7.3-10)* | Number increased each FY |
| Develop a media and marketing strategy that makes the public more aware of hunger in its communities  
a. Develop a comprehensive plan that increases media coverage by 50 percent | **ST:** Develop a comprehensive plan that increases media coverage by 50% *(Figure 7.1-11)*  
**LT:** Develop and deploy a coalition of key communities and advocacy to advance public policy on hunger | **ST:** Number of media messages  
**LT:** Percent to plan’s completion |
| Participate with state and county emergency-response activities to meet the emergency and seasonal food needs of the community, as well as those at greatest risk: seniors and children  
a. Fully integrate Emergency Resource Plan (ERP) with local disaster and emergency relief organizations  
b. Create a plan of action to strengthen and expand the FBLC to meet seasonal needs and emergency needs of those at greatest risk  
c. Respond to the needs of member agencies and support their development | **ST:** Fully integrate ERP with local disaster and emergency relief organizations *(Figure 7.5-17)*  
**LT:** Integrate with regional sources | **ST:** % of integration achieved  
**LT:** % of integration achieved (FBLC comparisons) |
|  | **LT:** Create a plan of action to strengthen and expand the FBLC to meet seasonal needs as well as the needs of those at greatest risk *(Figure 7.5-10)* | **LT:** % of time SF meets the seasonal demand (FBLC, FBA comparisons) |
|  | **ST:** Develop and implement training initiatives to orient and gain employee/volunteer acceptance and understanding of working in a collaborative environment *(Figure 7.4-3)* | 75% “Overall Satisfaction” through internal survey of employees/volunteers |
| Increase the amount and quality of food delivered  
a. Strengthen and develop the accountability, effectiveness, and efficiency of SF’s food distribution systems  
b. Increase food and grocery donations through nontraditional sources, seeking a better nutritional mix of food products | **ST:** To increase lbs. of food per person in poverty by 5% *(Figure 7.1-9)*  
**LT:** To achieve “best practice” of lbs. per person in poverty | % achieved (IFBA and FBA comparisons) |
|  | **ST:** To be at 95% adherence with FBA model operating protocols and standards by FY2007 *(Figure 7.4-15)*  
**LT:** Achieve and sustain 100% adherence with FBA operating protocols and standards by FY2009 | FBA National Operating Protocols and Standards |
|  | **ST:** Link donated food to AAFNHA Nutrition Scale *(Figure 7.1-5)*  
**LT:** Achieve rating of 10 on AAFNHA Nutrition Scale by FY2010 | AAFNHA Nutrition Scale (IFBA, FBA comparisons) |
|  | **ST:** Utilize Rapid Inventory Control Enterprise (RICE) system to reduce spoilage and errors in inventory management *(Figures 7.5-11, 7.5-19)* | % of spoilage <3% by FY2007 (FBLC, FBA comparisons) |
|  | **LT:** By FY2009, increase core food distribution *(Figure 7.1-1)* | Total pounds of food distributed (millions) (IFBA, FBA comparisons) |
|  | **LT:** Increase infrastructure—dry storage and freezer and refrigeration capacity—to meet enhanced services and distribution | % achieved square footage (FBA National Operating Protocols and Standards) |
|  | **ST:** Identify new member agencies to expand delivery of services | % achieved |
|--------------------|--------------|--------------|--------------|--------------|
| 35                 | 36           | 36.5         | 37.5         | >37.5        |
| 17                 | 18.5         | 20.5         | 22.5         | >22.5        |
| 52                 | 55           | 57           | 60           | >60          |
| 9 (overall satisfaction) | 9.25 (overall satisfaction) | 9.5 (overall satisfaction) | 9.75 (overall satisfaction) | 10 (overall satisfaction) |
| 7.25%              | 8%           | 9.5%         | 11%          | 12.25%       |
| 28,600 hrs.        | 31,460 hrs.  | 34,606 hrs.  | 38,067 hrs.  | 41,874 hrs.  |
| 80%                | 85%          | 90%          | 95%          | 99%          |
| 4                  | 5            | 6            | 8            | 10           |
| 84%                | 90           | 95           | 100          | 122          |
| 0%                 | 25%          | 50%          | 75%          | 100%         |
| 65%                | 100%         | 100%         | 100%         | 100%         |
| 0%                 | 25%          | 50%          | 75%          | 100%         |
| 80%                | 90%          | 95%          | 97%          | 100%         |
| 9 (overall satisfaction) | 9.25 (overall satisfaction) | 9.5 (overall satisfaction) | 9.75 (overall satisfaction) | 10 (overall satisfaction) |
| 100 lbs.           | 105 lbs.     | 110 lbs.     | 115 lbs.     | 120 lbs.     |
| 92%                | 95%          | 97%          | 100%         | 100%         |
| 88%                | 91%          | 95%          | 100%         | 100%         |
| 7                  | 7.75         | 8.25         | 9            | 10           |
| 7                  | 7.75         | 8.25         | 9            | 10           |
| 5%                 | <5%          | <3%          | <3%          | <3%          |
| 7.5 million        | 7.75 million | 8.25 million | 9 million    | 9.5 million  |
| 0%                 | 25%          | 50%          | 75%          | 100%         |
| 75%                | 80%          | 85%          | 90%          | 95%          |
2.2a(5) SF’s key human resource plans are aligned with the strategic objective of increasing organizational and resource capacity (Figure 2.1-3), which integrates with the strategic challenges, key success factors, and all of the organization’s key stakeholders. The key human resource plans to accomplish the short- and long-term objectives and action plans include the following:

- Increase volunteer hours by 10 percent each year through FY2010
- Enhance employee and volunteer training to manage the increased technical demands of operations
- Increase employee and volunteer retention by 5 percent each year

These plans address potential impacts on the workforce and its capabilities and capacity needs by increasing the size and training of the workforce to meet SF’s need for growth in food distribution, which has doubled since 2003 (see Figure 7.1-1). These plans also directly relate to SF’s strategic challenges of ensuring that food reaches those most in need, when they need it most; optimizing human resources and partnerships; and recruiting volunteers from a broad range of age segments.

2.2a(6) Figure 2.2-2 displays key performance indicators that are used for tracking progress on the action plans.

During action plan development and before team-based PDCA, SF utilizes the “hedgehog concept” and SWOT Analysis to ensure that the overall action plan measurement system reinforces organizational alignment. In addition, the multiple needs determination methods (Figure 3.1-1), Performance Review System (Figure 4.1-2), Key Hunger-Reducing Processes (Figure 6.1-1), and Support Processes (Figure 6.1-2c) enhance the organizational alignment of the measurement system.

The SPP (Figures 2.1-1) is designed to ensure that the measurement system covers all key deployment areas and stakeholders, including member agencies, community leadership, volunteers, and donors in the initial steps.

2.2b SF’s key performance measures for short- and long-term horizons and comparative sources are outlined in Figure 2.2-2. Performance projections are determined during step seven of the SPP. Primary sources of competitive comparisons are the FBA for national comparisons, the FBLC for regional comparisons to seven sister food banks, and the IFBA for state comparisons. These sources allow for national, regional, and local comparisons, which ensure that SF is working towards its mission and operating at or above industry standards.

SF’s SPP, as well as its PDCA approach to action planning, lends itself to demonstrated progress on the goals and objectives outlined in Figure 2.2-2. Results are displayed throughout Category 7. Gaps in performance against comparative organizations, such as Assistance Now Finder, are addressed during the monitoring stage of the SPP (Figure 2.1-1, step 12), when the Executive Director updates the board on the status of the Strategic Plan. In addition, the Performance Review System (Figure 4.1-2) and the Balanced Plate Scorecard (Figure 4.1-1) proactively address any gaps in performance that may occur.

### 3: Customer and Market Focus

SF seeks to understand the drivers of hunger and food-insecurity in its service area so that it can better address the requirements and expectations of all stakeholders relative to creating a hunger-free Iowa. As a community-based nonprofit organization, SF believes relationship building is a key to its success. Key marketing functions that support relationship building include the Segmentation Process, the Critical-to-Quality (CTQ) Determination Process, the Complaint Resolution Process, the Donor Pyramid Framework (Figure 3.2-1), the Satisfaction Determination Process, and program and service follow-up through comment/assessment cards and personal phone calls. All of these processes revolve around the PDCA Process (Figure 6.1-3).

#### 3.1 Customer and Market Knowledge

3.1a(1) As part of the SPP, SWOT Analysis, and Environmental Scan, the Segmentation Process is used to identify customers, customer groups, and market segments. The process, which is managed by the Retreat Committee and includes board members and SF’s senior leaders, ensures that SF, through its member agencies, is meeting the needs of its customers and pursuing the most appropriate customers for future products and services. The key steps in the Segmentation Process are (1) gathering, analyzing, and integrating information, data, and organizational knowledge about the food-insecure served by member agencies using numerous listening and learning methods (Figure 3.1-1); (2) validating existing segments and identifying emerging segments, additional opportunities, and challenges; (3) communicating final segmentation through SF; and (4) organizing information, data, and knowledge by segment as input into the CTQ Determination Process. In step two of this process, additional opportunities and challenges include outreach and surveys of food pantries, soup kitchens, homeless shelters, senior centers, and other nonprofit, charitable organizations that feed the hungry but that do not receive food and services from SF. Data gleaned from this outreach and surveys are input into step one of the Segmentation Process in an attempt to secure future business.

The Segmentation Process has become a key focus because the food-insecure (clients, both individuals and households) are constantly shifting as clients’ jobs come and go and other resources become available to them; for example, there has been growth in the Hmong and Hispanic populations in the past year. As SF provides food in bulk and repackaged meals to member agencies, who in turn serve the food-insecure—some 75,000 client contacts in 2006—SF surveys member agencies to determine the changing
needs of their clients. The potential core market for SF is all those who are food-insecure in the six-county area. A growing number of member agency clients are perennially in need, with the majority of those being served between five and 65 years of age. Hunger affects families from all segments of society.

Within its service area, SF considers additional segments: member agencies for which it provides bulk food or repackaged meals, donors (food, finances, and services), community segments, and other stakeholders. For the purposes of gathering requirements, expectations, and satisfaction data, SF segments those receiving bulk food or repackaged meals by the size of the agency, frequency of service, and urban/rural location. Donors are segmented by type of contribution (e.g., services, food or funds, frequency of giving, and size of overall gifts). The community segments include service organizations, such as various scouting and school groups, as well as leaders from local communities and the Greater Des Couers Area Chamber of Commerce.

3.1a(2) Multiple communication methods (Figure 3.1-2) use the voice of the customer to determine the requirements, needs, and changing expectations of each of SF’s segments. These methods reach SF’s four stakeholder groups listed in Figure P.1-4. Figure 3.1-1 shows how SF uses customer input and its relative importance to relationship decisions. Figure 3.1-1 also shows how the listening methods vary for each customer group.

To ensure an understanding of the requirements of each segment and to identify their relative importance, SF uses the CTQ Determination Process and PDCA for translating information and data gained through the various listening and learning mechanisms. This knowledge is used in planning, performance reviews, relationship management, design of operations, and day-to-day management of the distribution network. The first step of the five-step CTQ Determination Process is to collect information on requirements through numerous listening and learning methods. Information can be gained from emerging federal/state/county requirements and from networking with other food bank and social service organizations. The Ways of Connection, which works with many area charities and nonprofits, provides a Community Needs Assessment that covers the communities within SF’s service area. This information serves as input to the Agency Relations and Friend-Raising Committees to help guide the supply chain and agency/industry relations and to help determine philanthropy and volunteer development. Working with DU students and fellows, SF develops and implements listening processes for each segment based on community needs.

SF utilizes DU student-developed surveys to listen and learn about requirements of its multiple segments and to determine the relative importance of requirements/expectations. Input from FBA national surveys is utilized to ensure that data can be compared for benchmarking purposes. In addition, input can be obtained from ad hoc focus groups, facilitated by a member of the Program/Operations Committee, that include member agency and volunteer participants and meet at the SF facility. (Confidentiality is absolutely assured at all focus groups, as a way to follow all Privacy Act restrictions not to overtly identify benefit recipients). In 2005 an enhanced focus group looked at how to provide food that fits the tastes of the growing Hmong population.

The second step of the CTQ Determination Process is to conduct numerous types of analyses to provide an understanding of segment requirements and their impact on operations and processes at SF. The Program/Operations and Friend-Raising Committees use the findings from needs analyses, including complaint data, to ensure that the needs of different member agencies are addressed in service design.

The third step is to share requirements. SF uses various communication methods (Figure 3.1-2) to inform member agencies, the community, and other stakeholder groups about current and emerging requirements. For example, SF used its Web site, newsletter, newspaper articles, radio, and fliers to communicate the need for additional food donations in early summer to accommodate the seasonal demand placed on member agencies to feed school-aged children who do not have access to free or reduced-price lunches when school is not in session. Sharing requirements helps SF to gain customer loyalty and referrals and to retain current customers.

The fourth step is to use analyzed findings. These findings include information on needs, expectations, and organizational knowledge related to requirements that is organized by segment and used throughout SF to help it attain goals. As a small organization, SF shares information daily on an informal basis; however, to work with large numbers of volunteers and member agencies, SF’s formal SPP utilizes input from all stakeholders, including volunteers, and ensures that the information is deployed to all employees, volunteers, and member agencies. This information is often used to make work system and work process improvements. Requirements are put into the SPP, SWOT Analysis, and Environmental Scan to drive development of the Strategic Plan, and the SPP is used in reviews to determine if performance is meeting requirements. The findings also are used by each of the board committees to ensure that they develop processes and plans to meet the needs of SF’s stakeholders. SF analyzes data on food and information relative to current trends in U.S. philanthropy, suppliers, volunteers, and the demographics of those being served.

SF takes a leadership role in many community, state, national, and international organizations (Figure 1.2-2) to further board members’, employees’, and volunteers’ understanding of the food-insecures’ changing needs and requirements and the patterns of philanthropic giving, and to identify other opportunities to serve the food-insecure.

3.1a(3) The fifth step of the CTQ Determination Process is to evaluate and improve. The board and senior leaders annually evaluate the voice-of-the-customer information and feedback to become more customer-focused, to better satisfy customer needs and desires, and to identify opportunities for innovation. For example, SF has worked with DU to continually review additional voice-of-the-customer methods that can be used with the various stakeholder groups. Findings from focus groups helped encourage the use of volunteers from area technical colleges and brought to light the enthusiasm that high school students who are seeking to add a community service component to their curriculum bring to SF. A change that is currently being implemented is the development of a short Web-based survey on the SF Web site that community members, volunteers, and other organizations
can use to provide information and feedback on their experiences with SF. The survey includes an open-ended question relative to suggested improvements. SF has plans to make this survey available in Spanish and Hmong.

3.1a(4) The fifth step of the CTQ Determination Process also allows the board and senior leaders to evaluate the listening and learning methods to stay current with business needs and directions. Figure 3.1-2 illustrates how SF accomplishes this for each

Figure 3.1-1 How SF Uses the Voice of the Customer

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Needs Determination Methods</th>
<th>Information Collected and Shared</th>
<th>Relative Importance to Relationship Decisions</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Member agencies</strong> (customers) receiving bulk food and repackaged meals</td>
<td>Surveys</td>
<td>DU students assist with a quarterly survey on past services and projected future demand.</td>
<td>Students analyze information quarterly as part of a DU class to make recommendations.</td>
<td>Quarterly/Annual</td>
</tr>
<tr>
<td></td>
<td>Focus groups</td>
<td>Partnership discussions are held to determine supply chain requirements and changing requirements due to demographic changes.</td>
<td>The Program/Operations Committee facilitates these focus groups to better understand improvements that can be made.</td>
<td>Ad Hoc</td>
</tr>
<tr>
<td></td>
<td>Comment/Assessment cards</td>
<td>SF supplies a card with each delivery to solicit comments on quality and timeliness.</td>
<td>Complaints are resolved within the goal time of 24 hrs. The data are analyzed monthly.</td>
<td>Daily/Monthly</td>
</tr>
<tr>
<td></td>
<td>Telephone</td>
<td>A toll-free telephone line is available for suggestions/complaints/feedback.</td>
<td>Complaints are resolved within the goal time of 24 hrs. Suggestions, feedback, and other data are analyzed monthly.</td>
<td>Ongoing</td>
</tr>
<tr>
<td></td>
<td>Data collection</td>
<td>Data are collected daily about the demographics of those being served and the number served.</td>
<td>Trends are kept in the Donation Tracker database to determine patterns of use, to correlate with area demographic and economic trends, and to forecast future demand.</td>
<td>Daily</td>
</tr>
</tbody>
</table>

| Community Segments | Surveys, Number of volunteers, Number of grants, Representation within community-based organizations | Data are collected on the number of organizations donating/volunteering and the amounts, the number of grants given by local businesses, and the number of FEED partnership proposals supported (see Figure 7.6-15). In addition, data are gathered relative to pending employee layoffs in the communities served through the Des Couers Regional Economic Development Council. | A quarterly review by the Friend-Raising Committee determines how to raise more funds, and an ongoing review by the Development Committee helps to identify new grant opportunities. | Quarterly |

| Donors (food, finances, and/or services) and Other Stakeholders (including county, city, state, and federal governments; the FBA; the FBLC; the IFBA; and taxpayers) | Surveys, Meetings, Personal contact, Assistance Now Finder, Direct mail, Telemarketing, Media, the Web site | Information is collected relative to expectations and satisfaction, the number of donors, amount donated, and retention of donors. Data are analyzed and made available to the board and senior leaders. Data also are conveyed through the Share Food for Thought newsletter, meetings, memos, and reports. | Trends are kept in SF’s Donation Tracker database to determine patterns and to forecast future donations. The Assistance Now Finder rating is tracked. | Semiannual/Annual |

| Other Stakeholders | | | | |
of its customer segments (i.e., stakeholder groups identified in Figure P.1-4).

### Figure 3.1-2 Communication Methods

<table>
<thead>
<tr>
<th>Method</th>
<th>Information Collected/ Communicated</th>
</tr>
</thead>
</table>
| Word-of-Mouth (C) | • Information collected by employees and volunteers relative to needs and services  
• Information provided relative to job assistance and other questions asked by the food-insecure (clients) or other stakeholders (Figure P.1-4) |
| Telephone (C), (D/S) | • Inbound complaints  
• Outbound surveys  
• Personal contact with donors |
| Web-Based (C), (S), (CS), (D/S) | • Web site containing information on SF, such as hours of service, directions, how to volunteer, and how to donate  
• Web site soliciting information and containing issues of *Share Food for Thought* newsletter and other information of interest  
• Web site containing healthy recipes and nutritional information about SF’s food |
| Electronic billboard (CS) | • An electronic billboard, donated by a supplier, is located outside the food bank warehouse and flashes information, alerting the community about volunteer needs, upcoming food drives, and other important events |
| *Share Food for Thought* newsletter (C), (S), (CS), (D/S) | • Available at member agencies  
• Sent to all donors, member agencies, partners, employees, and volunteers  
• Posted on the Web site |
| Community newspapers (CS), (D/S) | • Advertisements placed with notices of what SF is doing and with SF’s Web site information to solicit volunteers and donors |
| Fliers/postings in the community (including laundromats, convenience stores, churches, and other locations often visited by volunteers) (CS) | • Fliers including hours of operation, location, and information about member agencies  
• Public service announcements during church events |
| Radio/TV public service announcements (C), (S), (D/S) | • Weekly inclusion of SF and member agencies’ hours of service, directions, and information on becoming a volunteer  
• Solicit donations |
| Annual report to donors (S), (D/S) | • Annual report of financials and services provided |
| Association and community representation (S), (CS) | • Opportunities for coalition building to provide network of services for food-insecure |

(C)=Customers, (S)=Stakeholders, (CS)=Community Segments, (D/S)=Donors/suppliers

All board members, employees, and core volunteers receive training on the Baldrige Criteria and use this framework to improve their understanding of how well SF is performing and to plan how the organization should perform in the future. This is reflected in the format of the Strategic Plan that addresses the seven Criteria Categories and each area of PDCA.

### 3.2 Customer Relationships and Satisfaction

As it is the desire of SF that the food-insecure obtain the means to feed themselves and their families, it is key that relationships are built to help assist them. Relationships with member agencies that SF serves, with its donors/suppliers, with its communities, and with its partners are key to its success.

#### 3.2a(1) SF’s approach to relationship management is to meet and exceed the expectations of stakeholder groups to increase loyalty and repeat business. Employees and volunteers query those using SF’s services to determine the relationship needs as indicated in 3.1a(2) and Figure 3.1-1. The primary expectation of donors is that they want to help as many of the food-insecure as possible, and the primary expectation of member agencies is that they are able to provide high-quality, nutritious food to hungry Iowans.

Relationship building with donors and other providers is more formalized. The Development and Friend-Raising Committees provide support and direction to philanthropic development through identifying potential financial donors or donor groups and by developing strategies to build relationships and solicit support based on the Donor Pyramid Framework (Figure 3.2-1).

When a new donor is entered into the Donation Tracker database (Figure 4.1-1), an acknowledgement signed by SF’s senior leaders is generated. SF’s universe of donors and potential donors receives a special copy of the *Share Food for Thought* newsletter, as well as SF’s annual report. The donors are honored at SF’s annual banquet, which also has a silent auction as a fundraising activity. To ensure continued loyalty and referrals, SF employees work with marketing students from DU, and volunteers and board members conduct a semiannual telephone survey to thank the donors and encourage their ongoing support. Articles in community newspapers also are used to develop a continued awareness of SF’s needs. If a key donor decides not to contribute for the next year, personal calls are made by SF’s employees and volunteers to determine what improvements might be made to win back its continued support.

SF’s relationships with food donors (e.g., Platinum Foods, Blue Troll, and Linda Foods Corporation) are key to organizational success and are supported by the Program/Operations Committee.

#### 3.2a(2) Key access mechanisms have been developed to ensure that SF’s multiple segments (Figure P.1-4) receive needed information, conduct business, and can make complaints. Not all segments (e.g., some volunteers and taxpayers) have access to the Internet and e-mail, so personal interaction is key. The following key access mechanisms are used:

- SF’s Web site
- Word-of-mouth through volunteers, employees, member agencies, community leaders, and partners
• One toll-free number for suggestions/complaints/feedback and a second 800-hotline to report ethics violations

• Daily walk-arounds

• Comment/assessment cards at each member agency site and inserted with food shipments

• Ways of Connection’s Community Needs Assessment

• Donor follow-up phone calls

• Interaction with member agencies and health and social service organizations

The key customers’ contact requirements for each mode of customer access were determined through research as indicated in 3.1a(2). With a workforce composed primarily of volunteers, SF views communication as a key mechanism. To ensure that contact requirements are deployed to all people and processes involved in the customer response chain, during each shift, employees and volunteers are reminded to gather information from member agencies served and to ensure that it is collected and entered into the database. These data are used in the SWOT Analysis and Environment Scan to determine if member agencies’ needs can be met within the budget and by the employees and volunteers of SF.

3.2a(3) As a small organization, SF is able to quickly review and resolve complaints effectively and promptly, which mainly come through the 800-number located at the food bank offices in the warehouse. If possible, the person hearing the complaint resolves it within the goal time period of 24 hours. SF provides pads of pocket-sized complaint forms to all employees and volunteers so they can record the complaints as soon as possible. The complaint form is filled out along with the resolution, and the complaints are sent to an employee for logging. To keep data on complaints, the following Complaint Resolution Process is used:

1. Each employee or volunteer keeps a complaint log, which identifies the date, specific issue, and how the complaint was resolved. Complaints are addressed at the level where the problem occurred.

2. Complaints are reviewed by senior leaders, employees, and volunteer leaders at weekly and monthly meetings, as well as at quarterly brown-bag debriefings.

3. Quarterly, the board is updated on the nature and status of complaints.

4. Based on trend data stored in the FoodAnswers database, the senior leaders identify patterns and trends of complaints logged. An action plan is developed that implements solution strategies to reduce the number of complaints, thereby minimizing customer dissatisfaction and loss of business and referrals. Strategies are conveyed to employees and volunteers to ensure a consistent method of resolving complaints through daily walk-arounds and quarterly brown-bag debriefings.

In 2006 complaint data indicated that there were problems with food storage, so new refrigeration was added. Member agencies also have complained about the lack of nutrition information translated into Spanish and Hmong. This is being addressed (see 3.2b[4]). The software FoodAnswers, which has special accessibility by employees, volunteers, partners, and member agencies, as well as member food banks of the FBA, FBLC, and IFBA, provides some aggregation of complaints for use in improvements. Data can then be analyzed by senior leaders and employees. Figure 7.2-6 shows the overall number and type of complaints received.

3.2a(4) On an annual basis, as part of the SWOT Analysis, Environmental Scan, or SPP, the CTQ Determination Process is evaluated and improved using PDCA. In 2005 community surveys were implemented to help gather perceptions of SF’s service area. These approaches help SF keep its relationship building and customer access current with business needs and directions.

3.2b(1) SF uses multiple methods to gather data from stakeholders on the key factors that contribute to their satisfaction. The methods used to determine satisfaction, dissatisfaction, and loyalty follow the same basic steps but are modified to meet the varying needs of each segment of stakeholders (e.g., some segments are best reached by personal contact). Mailings are used to gather information from community members, and comment/
assessments are used to gather information from those to whom SF delivers food. At SF, board members and senior leaders feel that to better meet the needs of multiple stakeholders, it is extremely important to know what is working and what is not working.

SF uses a three-step Satisfaction Determination Process of gathering and analyzing data to assist in satisfaction determination and to ensure that the organization is capturing actionable information for use in exceeding customers’ expectations. The first step is to identify the factors of importance that contribute to satisfaction and dissatisfaction and to ensure, through review by senior leaders and board members, that the assessments used capture actionable information. SF gathers information from stakeholders on requirements, needs, and expectations, using the various listening/learning methods, or on needs determination methods, described in Figure 3.1-1.

The second step in the process is to deploy satisfaction assessments. SF uses numerous formal and informal methods to assess and measure satisfaction against the factors identified in step one. These methods are the same instruments that are used to gather information about relationship needs (see 3.2a[1]). Methods include internal and external surveys and focus groups for all stakeholder groups. Assessments are both paper-based and electronic. Multiple listening posts relative to learning about the needs and expectations of stakeholders also gather data about satisfaction.

Member agencies to which food is delivered are surveyed on a regular basis as to how their needs are being met by SF. With each food delivery, a comment/assessment card is included to provide immediate feedback. SF uses this customer satisfaction and dissatisfaction data for improvement.

Step three is to aggregate, analyze, and distribute the information. SF aggregates data by segment to provide different viewpoints; conducts gap analyses to identify differences in perception among groups; and shares the analyzed findings through employees, volunteers, board members, and the Program/Operations Committee. These data are used in the CTQ Determination Process. Information relative to satisfaction with the food supplied also is shared with donors/suppliers. Satisfaction with volunteers who assist member agencies and with individual food, finance, or service donors (e.g., SF gathers information on why financial donors choose to support SF) is shared in the Share Food for Thought newsletter.

3.2b(2) SF uses multiple methods to follow up on services to glean information that can immediately be used to improve. For food deliveries, the comment/assessment cards included with each delivery contain questions relative to food quality and timeliness of deliveries (see Figures 7.2-1 and 7.2-4). SF’s employees and volunteers also periodically call member agencies to gather additional input. Partners and bulk food donors are called quarterly by senior leaders or employees to thank them for their donations. Being a small organization, SF can review and react to feedback very quickly by reviewing and modifying action plans (Figure 2.2-2), if necessary.

3.2b(3) Competing successfully for donors is key to the success of the organization. A donor survey asks each donor if it contributes to other organizations and if the amount is equal to the amount contributed to SF. An additional question asks donors for information on “why” they donate. Information on and satisfaction of donors is compared with that of other food banks across the region (see Figure 7.3-8). SF shares this information, as it does not feel a competitive threat from its partners (Figure P.1-5). SF tracks the number of member agencies that other organizations serve to determine how well it is meeting its mission. This information is then used in the SWOT Analysis, Environmental Scan, and SPP.

3.2b(4) Working with DU, SF reviews its methodologies on an annual basis to ensure that it is using methods and tools that will work with the various populations served. For example, with the help of DU students and fellows, SF improved client satisfaction by translating nutritional information and questionnaires into multiple languages (i.e., English, Spanish, and Hmong) and by having volunteer translators available at focus groups, when possible, to help participants fill out comment/assessment cards and to gather information. Through the FBA and IFBA, SF is able to determine what others are doing across the state and nationally. SF also networks with its sister food banks in the FBLC to determine what others are doing regionally to serve the hungry.

“FOODS” represents SF’s key success factors, which include key financial measures.

As part of the SWOT Analysis (SPP, step three), the Retreat Committee reviews the current FOODS Balanced Plate performance measures and recommends changes to reinforce alignment with SF’s vision of a hunger-free Iowa. During 2003, the amount of grants and donations SF received decreased (see Figure 7.3-9), and this was highlighted in the SWOT Analysis. As a result, the working capital ratio replaced an accounts payable measure on the SF Balanced Plate as an improved measure of cash flow. Changing technology and regulatory requirements and their
performance measure implications also are considered during the SWOT Analysis. SF’s key organizational performance indicators are listed in Figure 4.1-1, in alignment with the FOODS Balanced Plate. The resulting data and information are used to support SF’s daily resource allocation decisions, organizational decision making, periodic reviews of its performance, and identification of improvement and innovation opportunities.

Decisions about new indicators are made based on new strategies requiring new data, changes to programs or services, or problems identified with current programs or services. Targets and indicators are re-evaluated based on changing priorities, local economic developments, or introduction of new methodologies. Indicators agreed on by the FBLC, for which SF is a member, also may be added. Timing of evaluation is based in part on when data are available, with some indicators reviewed daily, weekly, quarterly, or annually, as appropriate.

4.1a(2) SF ensures the effective use of key comparative data to support operational and strategic decision making and innovation by selecting data relevant to the local, regional, and national food banking industries. Comparative data are selected during step nine, Action Planning, of the SPP. Key sources of comparative data are the FBA and IFBA. Comparative data also are obtained

| Figure 4.1-1 SF’s Key Performance Measures and Balanced Plate Scorecard |
|-----------------------------|------------------------|
| **FOOD** | **Key Success Factor** | **Key Indicators** |
| **F** | Food availability and quality (F1) | - Total pounds of food distributed (Figure 7.1-1)  |
| | | - Inventory of food in days-on-hand (Figure 7.5-9)  |
| | | - Fill rate (Figure 7.1-4)  |
| | | - Member agency satisfaction with food selection (Figure 7.2-4)  |
| | | - Nutrition Scale (Figure 7.1-5)  |
| | Fiscal agility (F2) | - Organizational capacity (Figure 7.3-1)  |
| | | - Organizational efficiency (Figure 7.3-2)  |
| | | - Assistance Now Finder overall score (Figure 7.3-3)  |
| | | - Working capital ratio (see 7.3a[1] and Figure 7.3-1)  |
| | | - Current liabilities  |
| | Funding and food resources (F3) | - Donor satisfaction segmented by level of giving (Figure 7.2-9)  |
| | | - Number of years donors have been giving (Figure 7.2-10)  |
| | | - Fundraising efficiency (Figure 7.3-7)  |
| | | - Total number of gifts and donors (Figure 7.3-11)  |
| | | - Market’s trust and confidence in SF (Figure 7.3-10)  |
| **O** | Organizational effectiveness; optimization of human, financial, food, and other resources (O1) | - Average pounds of food collected (Figure 7.5-1)  |
| | | - SF effectiveness rating (Figure 7.5-4)  |
| | | - Food labeling accuracy (Figure 7.5-7)  |
| | | - Food spoilage and errors in inventory management (Figure 7.5-11)  |
| | | - SF’s ability to satisfy member agencies (Figure 7.2-5)  |
| | | - Sanitation and food handling and disposal compliance ratings (Figure 7.4-14)  |
| | | - Compliance rating (safety, certifications, and records maintenance) (Figure 7.4-15)  |
| | | - IRE Index (Figure 7.5-13)  |
| | | - Fleet Maintenance Index (Figure 7.5-20)  |
| | | - Key maintenance metrics (Figure 7.5-21)  |
| **O** | Organizational learning, collaboration, and innovation (O2) | - Annual training hours per employee and volunteer (Figure 7.4-1)  |
| | | - Employee and volunteer satisfaction with training (Figure 7.4-3)  |
| | | - Employee and volunteer injuries (Figure 7.4-4)  |
| | | - Mock disaster drill effectiveness (Figure 7.5-17)  |
| | | - Post-court-ordered placement volunteer retention (Figure 7.4-9)  |
| | | - Percentage of key suppliers’ products utilized and level of re-engagement with SF (Figure 7.5-14)  |
| **D** | Dedicated and experienced employees and volunteers | - Average monthly hours contributed by SF’s core volunteers (Figure 7.4-11)  |
| | | - Workforce and leader development and percentage cross-trained (Figure 7.4-7)  |
| | | - Number of groups who volunteer per year (Figure 7.4-12)  |
| | | - Volunteer recruitment—effectiveness (Figure 7.4-13)  |
| | | - Number of employees/volunteers who receive enhanced technical/certification training (Figure 7.4-2)  |
| | | - SF clients who become active volunteers (Figure 7.4-5)  |
| | | - Volunteer retention by total number of volunteers (Figure 7.4-6)  |
| | | - Volunteer referrals of family and friends (Figure 7.4-8)  |
| **S** | Satisfaction | - Satisfaction of member agencies (Figure 7.2-5)  |
| | | - Satisfaction of donors/suppliers (Figures 7.2-9, 7.5-15, 7.5-16)  |
| | | - Satisfaction of the community (Figure 7.2-11)  |
from the FBLC. Comparisons are used for key measures on the SF Balanced Plate Scorecard to establish stretch targets and breakthrough goals, and to evaluate performance, as well as inputs to the SWOT Analysis/Environmental Scan step of the SPP.

4.1a(3) SF’s performance measurement system is reviewed as part of the SPP to keep it current with business needs and directions. In 2001 SF submitted its first state quality award application, and the lack of a systematic review of its Balanced Plate was identified as an opportunity for improvement. A PDCA cycle was performed by volunteers from SF’s partner Platinum Foods and the Finance/Audit Committee. As a result, an annual review of the Balanced Plate Scorecard by the Executive Director and the Finance/Audit Committee was included in the SPP, starting in 2002. Recommended additions, deletions, and changes to the Balanced Plate Scorecard review are used as inputs to the SWOT Analysis step of the SPP. The frequency of the reviews that comprise SF’s Performance Review System (Figure 4.1-2) keep the organization sensitive to rapid or unexpected organizational or external changes.

In 2002 SF began accepting court-ordered community-service volunteers from the Des Couers County court system as part of a pilot program. Based on volunteer retention after mandated-community-service hours were completed, the initial pilot was considered a success, and SF has expanded the program over recent years (see Figure 7.4-9). To support the program, a volunteer-retention measure for the court-ordered volunteers was added to the Balanced Plate Scorecard in 2004.

4.1b(1) SF’s performance and capabilities are reviewed during a series of planned meetings based on the Balanced Plate (Figure 4.1-1). SF’s senior leaders conduct analyses as part of the Performance Review System (Figure 4.1-2) to assess organizational success, including SF performance against comparative performance levels and progress on strategic objectives. Trend and Pareto analyses are performed to support the reviews and ensure that conclusions are valid. The Annual Harvest, SWOT Analysis and Environmental Scan, Board of Directors’ Review, and Monthly Harvest assess organizational success with a review of key indicators. Competitive performance is assessed during the Performance Excellence Self-Assessment, and progress relative to strategic objectives and action plans is assessed during the Monthly Harvest. The frequency of the assessments allows SF to respond rapidly to changing organizational needs.

4.1b(2) Senior leaders set priorities for continuous improvement from the opportunities identified during daily walk-arounds. Priorities for breakthrough improvements are identified during step seven, Development of Strategic Objectives, of the SPP. Each priority for breakthrough improvement, including the assignment of a senior leader champion and allocation of resources, is translated into an action plan, which is deployed as described in step nine of the SPP.

4.1b(3) The results of organizational performance reviews are incorporated into the systematic evaluation and improvement of key processes using the PDCA Process (Figure 6.1-3).

### 4.2 Management of Information, Information Technology, and Knowledge

4.2a(1) Needed data and information are made available through the software and information systems listed in Figure 4.2-1. Specific information, process examples, software, information systems, and information users also are listed in Figure 4.2-1. The software/information systems are made accessible to SF’s workforce, suppliers, partners, collaborators, and member agencies, as appropriate. Access to member agency information and contacts (e.g., names, addresses, tax identification numbers, and information on food-insecure agency clients that is protected by privacy laws) is limited to SF employees who have received training on privacy laws. Access to information by volunteers is strictly limited to information necessary to do their daily tasks.

An example of how needed data and information are made available is the software FoodAnswers. Based on funding constraints, SF developed a 2003 strategic objective to increase the number of corporate contributors in order to increase SF’s monetary support. SF worked with one corporate contributor on a successful grant that resulted in the award in 2004 from the FBA of its Web-based, integrated, best-practice tracking software (FoodAnswers). This software allows SF to more quickly and efficiently manage best practices and other knowledge. Pro bono volunteers from IA Tech Firm installed and tested the software, and they assist with maintenance and upgrades. Needed data and information are made available to employees, volunteers, the board members, donors, member agencies, suppliers, and partners through SF’s Web site and various software and information systems (Figure 4.2-1). Linda Foods Corporation donated a previous-generation Web server to SF to host the software. In addition, RICE, which was implemented in 2005, allows employees real-time

### Figure 4.1-2 SF’s Performance Review System

<table>
<thead>
<tr>
<th>Review</th>
<th>Frequency</th>
<th>Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Harvest</td>
<td>Annual</td>
<td>Review of key indicators: what is working, what is not</td>
</tr>
<tr>
<td>Performance Excellence Self-Assessment (Baldrige and state award processes)</td>
<td>Annual</td>
<td>Internal self-assessment of all Baldrige Categories and review of the previous year’s state-award feedback report</td>
</tr>
<tr>
<td>SWOT Analysis (even years) and Environmental Scan (off years)</td>
<td>Annual</td>
<td>Review of all key indicators</td>
</tr>
<tr>
<td>Board of Directors’ Review</td>
<td>Quarterly</td>
<td>Review of key indicators by Finance/Audit, Program/Operations, and Friend-Raising Committees</td>
</tr>
<tr>
<td>Monthly Harvest</td>
<td>Monthly</td>
<td>Review of key indicators using the Balanced Plate Scorecard and progress toward strategic objectives</td>
</tr>
<tr>
<td>Daily Harvest</td>
<td>Daily</td>
<td>Review of daily food volume received and distributed, food safety concerns, complaints, and volunteer end-of-day results</td>
</tr>
</tbody>
</table>
knowledge of what food is available, where it is located, and its expiration status.

4.2a(2) Hardware and software are maintained by computer-oriented volunteers, with expertise provided by pro bono work from IA Tech Firm. Staff there provide troubleshooting and monthly preventive maintenance to ensure reliability. Security is ensured through physical control of the server in a locked closet at the SF food bank. Software is secured by limiting user rights. RICE and FoodAnswers are custom-developed to support food bank operations and are the most frequently used software by food banks. Periodic updates from the FBA are used to enhance the functionality and user-friendliness of the systems.

4.2a(3) All hardware and software systems are backed up on a weekly basis. Backed-up software can be reloaded, and operations are restored to ensure the continued availability of data and information.

4.2a(4) An assessment of current hardware, software, and information availability mechanisms is included in the annual SWOT Analysis during the SPP. Possible improvements or changes to hardware or software are included in annual action planning.

4.2b(1) SF uses software such as FoodAnswers and RICE (Figure 4.2-1), as well as its validation processes, to ensure the accuracy, integrity, reliability, timeliness, security, and confidentiality of its organizational data, information, and knowledge, as shown in Figure 4.2-2.

4.2b(2) Workforce knowledge is captured and shared through volunteer and employee e-mail, the Share Food for Thought newsletter, refresher training, training materials, and the Visual Process. For example, during a volunteer job rotation, the Visual Process was piloted to improve the sorting of cold cereal boxes from one-flavor Linda Foods’ pallets to mixed-flavor boxes for member agency distribution. With this new process, cycle time was reduced by 18 percent, and this knowledge was collected by senior leaders and added to the Visual Process descriptions. Knowledge is transferred to and from food donors and member agencies through e-mail, the newsletter, and routine supply chain interactions. Best practices are identified and shared in daily walk-arounds, FoodAnswers, and Monthly Harvest reviews by senior leaders. In addition, best practices are shared through participation in FBA, IFBA, and FBLC activities.

### Figure 4.2-1 SF’s Information Availability

<table>
<thead>
<tr>
<th>Software/Information Systems</th>
<th>Information Users</th>
<th>Information/Process Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donation Tracker</td>
<td>Donors/suppliers, foundations, grantors, Finance/Audit and Friend-Raising Committees, FBA, state and federal government agencies</td>
<td>Allows users to make a financial donation to SF, print donation receipts, and gauge progress toward fundraising goals. It also tracks financial donors and member agency trends.</td>
</tr>
<tr>
<td>RICE (Rapid Inventory and Control Enterprise)</td>
<td>Donors/suppliers, retail grocers, restaurants, farmers, employees and volunteers who deal with food distribution, Program/Operations Committee, partners, member agencies</td>
<td>All food products are labeled and entered into RICE. Allows users to learn how to donate or salvage food, where to donate food, how to organize a food drive, and how to recognize donors. Also provides nutrition information, weekly member agency menus, current and expected food availability ( perishable and non perishable), delivery schedules for member agencies, and Balanced Plate food availability indicators.</td>
</tr>
<tr>
<td>Expense Tracker</td>
<td>Board of Directors, Finance/Audit Committee, state and federal government agencies</td>
<td>Allows users to access annual reports, including all Balanced Plate financial indicators.</td>
</tr>
<tr>
<td>FoodAnswers</td>
<td>Employees, volunteers, partners, member agencies, donors/suppliers, FBA, FBLC, IFBA</td>
<td>Allows users to access Visual Process descriptions and search for best practices. The software also is available to aggregate complaints for use in improvements.</td>
</tr>
<tr>
<td>Training and Volunteer Tracker</td>
<td>Friend-Raising Committee, employees and volunteers, senior leaders</td>
<td>Captures the special skills and interests of all employees and volunteers, available students/programs from DU, available fellows, and corporate contributors’ training offers. Allows users to learn how to volunteer, how to sign up, and how to organize a volunteer event. Users also can gain information on employee and volunteer skill sets, job preferences, scheduling, training verification/mandatory skills training, verification of security checks, languages spoken, volunteer benefits, and volunteer event information.</td>
</tr>
</tbody>
</table>

### Figure 4.2-2 Data and Information Quality

<table>
<thead>
<tr>
<th>Factor</th>
<th>Validation Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accuracy</td>
<td>Training, limited data entry fields, audits, drop-down menus, field validation, spell checker, bar codes</td>
</tr>
<tr>
<td>Integrity and reliability</td>
<td>Training, audits, pilots, beta testing, system backups</td>
</tr>
<tr>
<td>Timeliness</td>
<td>Training, Web-based data access 24/7, electronic reports</td>
</tr>
<tr>
<td>Security and confidentiality</td>
<td>Training, policies and procedures, off-site system backup, regulatory compliance, password authorization, server and password controls, limited administrator rights</td>
</tr>
</tbody>
</table>
5: Workforce Focus

5.1 Workforce Engagement

5.1a(1) SF has sought to understand the key drivers of workforce engagement and their relationship on organizational performance. In 2004, during a cycle of the SPP, senior leaders developed an initial set of key factors that affect employee and volunteer well-being, satisfaction, motivation, and engagement. An employee and volunteer survey implemented that same year validated the factors, which can be segmented and analyzed by employee or volunteer, by function, and by length of service. SF recognizes that volunteers who are present only for a specific event have different needs and expectations than those who commit to SF over a long period of time. The validation of factors impacting workforce engagement is now a routine component of the SPP.

5.1a(2) To promote initiative and empowerment, employees are responsible for the oversight of operations at SF and link all V-teams. Employees are empowered with the authority to organize and manage volunteers to maximize performance. In 2007 each employee will be cross-trained in multiple processes to cover different areas when needed. In addition to employees, volunteer leaders developed in SF’s LDP have strong organizational process knowledge and, absent an employee, have the authority to place the appropriate volunteers in jobs to ensure that the daily work continues. All employees and volunteers work cooperatively in teams—at SF no one works alone.

Employees and volunteers also participate on process improvement teams (PITs, see 6.2a[1]), other short-term or ad hoc groups, and informal committees to drive innovation and ensure that all perspectives are represented on all teams. As the diversity of its service area changes, SF works to ensure that divergent representation is incorporated into its workforce and workforce planning efforts, particularly through its cross-functional team structure.

SF’s culture supports frequent feedback and shared problem solving among all elements of its workforce, with particular attention given to safety, the upholding of SF’s values that “everyone deserves respect” and “careful use of resources,” and behaviors that support and advance its mission. Most employees and volunteers choose to assist SF for personal, values-based reasons. Feedback on the impact of SF on its communities is appropriately shared with employees and volunteers, reinforcing the significance of their impact on the lives of hungry Iowans.

To communicate across the organization and throughout the day, SF has structured its volunteer shifts to overlap. SF’s senior leaders conduct daily walk-arounds through work areas at the food bank to personally interact with employees and volunteers. In addition, SF’s employees are present during shift changes to welcome volunteers, share updates, collect feedback from other V-teams, and respond to questions or concerns. Employees and volunteer leaders routinely collect information from across shifts and share it with each other at shift changes in order to keep information flowing to the member agencies and collection points where employees and volunteers may be working and back to leadership. Key measures also are posted and discussed with employees and volunteers. Since many volunteers serve only during special events or for a specific activity, multiple ongoing communication methods are used to keep them engaged and informed (see Figure 3.1-2).

5.1a(3) SF’s performance management system supports workforce engagement by facilitating feedback to and among senior leaders, employees, and volunteers. It supports high performance and contributes to achieving the Strategic Plan through the following performance management processes: annual reviews of employees by senior leaders; quarterly, team-based, informal, brown-bag debriefings with V-teams; and event or project-based orientation and debriefing for occasional or project-based volunteers.

Employee reviews and team-based debriefing processes may include discussions of the following areas: performance standards, customer feedback (praise and concerns), behavioral expectations of a team, organizational training needs, and safety, as well as skill and leadership development opportunities.

Motivation is an important issue in an organization that is so heavily volunteer-based. In general, SF’s volunteers are intrinsically motivated to be part of the mission to help the food-insecure. Not infrequently, they have had personal experiences with being food-insecure and have a special sense of giving back to their communities (see Figure 7.4-5). They may see volunteering for SF as a way to make a clear, tangible difference in the lives of neighbors. Those who volunteer for projects that require special expertise, such as updating information systems, warehousing, providing nutritional and dietary guidance, and maintaining the supply chain, typically benefit from having had the experience of being a volunteer. Surveys show that volunteers are attracted to SF because it provides the opportunity to respond to a need for which they are especially suited.

5.1b(1) SF ensures communication and skill-sharing across the organization through its Job Rotation Program, instituted in 2004, that efficiently introduces employees and volunteers to new people, to different work processes, and to the work of other V-teams in each segment of the organization. This program reduces the learning curve for new employees and volunteers, maximizing work performance in a short time frame. It also allows SF greater flexibility in staffing and ensures knowledge transfer and skill-sharing across the organization and its workforce.

Rotations are made at the beginning of every fourth month. Rotation assignments are designed to be sensitive to special needs...
and volunteer preferences due to reasons of health, safety, or other special requests. This rotation system creates a wider circle of comfort for volunteers, as it rapidly introduces them to other employees and volunteers on other V-teams. This expands SF’s culture of collaboration and trust within the organization and continues the smooth flow of work, with little disruption, regardless of the specific individual’s availability at any given time. Key functions can be completed in the event of absent volunteers or employees. Individuals who volunteer for a specific one-time event or activity, such as the Holiday Food Basket Programs at Thanksgiving or Christmas, are not included in the rotation.

All employees and volunteers are asked for their input on education and training needs. Although suggestions can be made at any time, the first week of each quarter is designated as a time when employees can specifically convey needs during briefing meetings. Volunteers note needs in the profiles they complete when they join SF and in surveys. In addition, information boards throughout the food bank have a designated area for employees and volunteers to write down needs and ideas for training. An employee is charged with capturing these needs/ideas and submitting them at the end of each week to a senior leader. The senior leaders review all ideas each quarter. The Training and Volunteer Tracker (Figure 4.2-1), a simple database, captures special skills and the interests of all employees, volunteers, available students/programs from DU, available fellows from local and state governments and foundations, and training offers from corporate contributors. Priority needs, such as training on new equipment or to meet new regulatory requirements, are compared to this list of resources. SF’s Volunteer and Outreach Manager is responsible for ensuring that training is planned, promoted, and carried out.

SF has largely overcome the educational challenges presented by depending heavily on volunteers by carefully analyzing the specific skills required by different job functions and the individuals—employee or volunteer—who deliver them. Educational opportunities are provided multiple times during a set period of time to give employees and volunteers working different shifts ample opportunities to attend. Training programs offered through lectures and presentations are taped and made available for employees and volunteers to take home to watch or to watch during lunch breaks. Technical or regulatory training is often provided electronically, using a computerized version of programmed learning. Some of the training sessions for certification or to meet regulatory requirements have mandatory tests that employees and volunteers must take before they are released to the work site. There trainees are teamed with mentors who observe and coach them. Enhanced technical and certification training also is required for certain employees and volunteers (see Figure 7.4-2).

Training for special events is provided “just-in-time.” Volunteers arrive on site at least 30 minutes before the actual event for which they will assist. This allows employees to provide information to them so they can deliver services reliably, accurately, and with respect for member agencies and/or the food-insecure. For these events, which typically involve a large number of volunteers, volunteer leaders (i.e., those who have completed the LDP) also are recruited and mentor other volunteers. Often, participation in an event is the first experience a volunteer may have with SF, so it is critical not only that the volunteer has a good experience but also that he or she is properly prepared.

When employees or volunteers return to their assigned work following training, mentors are assigned to them to reinforce new knowledge and skills on the job. Mentors observe the trainees and demonstrate techniques when appropriate. Each training course dealing with specific skills and behaviors includes a proficiency checklist. Mentors are responsible for reviewing and signing off on that checklist before employees or volunteers are released to work independently. In high-risk areas, such as those involving the handling of food appropriately, a trained employee typically serves as the mentor or, at a minimum, reviews the proficiency checklist and validates performance. This reduces the risk and liability of the use of volunteers throughout SF’s operations.

Although SF has been fortunate to have low turnover among its employees, volunteer turnover has been less stable. SF does have a number of core volunteers who have been involved for many years—some for longer periods than many employees—and these volunteers are scheduled to ensure the continuity of operations and trained in the LDP. SF also has a large number of individuals who volunteer for a short period of time and then matriculate. These volunteers frequently carry important knowledge about SF’s operations, especially about its interactions with member agencies and the food-insecure. Typically, SF’s employee and volunteer mentors have established positive relationships with these short-term-project or event-oriented volunteers and speak with them when they decide not to volunteer again at SF. This dialogue identifies the reason for the volunteer’s decision to leave SF and focuses on what the individual has learned during his or her time with SF that could improve the organization’s performance. Information gleaned from these encounters is captured in quantitative surveys and open comments, which are reviewed by the Volunteer and Outreach Manager. Graduate students from DU’s Human Resource Management classes have, for the last five years, taken on as a project the analysis of this information. While the quantitative data have been useful, the content analysis of the comments has often provided the best information for learning and continuous improvement.

5.1b(2) SF’s strategic action plans (Figure 2.2-2) stipulate the work to be done and include specific skills targeted for development. Current employees and volunteers are given the opportunity for training in the areas of need, and recruitment efforts target other specialized capabilities. SF’s LDP is open to its employees and volunteers, representatives from member agencies (see Figure 7.1-12), and representatives from other area nonprofit organizations to develop a pool of individuals with experience in nonprofit management. Employees are the glue that holds operations together. They receive training and support that go beyond covering technical requirements to building skills in communication, teambuilding, providing effective feedback, planning, and coordinating.

Individual development plans are created for employees through the performance management system, and senior leaders explore opportunities for providing access to identified training needs. Often SF’s employees are invited to attend training sessions provided by corporate contributors that address needed skills.
Additionally, public agencies and regulatory agencies often provide opportunities for employees to hone their technical skills.

5.1b(3) The effectiveness of SF’s education and training approach is measured, ultimately, through its performance metrics (see Figures 7.4-3 and 7.4-7). Because the link between strategy, action plans, recruitment, and training/development is explicit, the theory of cause-and-effect between training provided and organizational results is clear. In addition, training programs are evaluated in real-time. Pre- and post-surveys are used to identify the change in knowledge driven by specific training initiatives. Satisfaction with delivery and content is determined through a simple “poker chip test.” All training participants are given two poker chips (one red and one green) when they attend a SF training program. A bowl is set on a table close to the exit of the training room, and employees and volunteers are asked to drop a green chip into the bowl if they believe the training was valuable, and a red one if they do not. This provides feedback in real-time and makes the perceived value of training transparent. For those training programs that cover several hours, this technique may be used at breaks as a quick indicator of the need to correct the program or delivery. In addition to this immediate feedback process, program evaluations are distributed to participants at all training programs for completion and analysis (see Figure 7.4-3). The presenters are responsible for tabulating the evaluations and using the feedback to improve programs.

5.1b(4) SF’s senior leaders put a lot of time into understanding the driving force behind an individual’s decision to work or volunteer at a nonprofit agency, and SF uses information on these decisions to recruit and retain volunteers. One method used to address volunteer career progression is SF’s mentoring program. Mentors are selected based on their experience and natural abilities to develop strong relationships and to identify different learning objectives and needs. They are trained to work with employees, volunteers, and senior leaders to help surface those needs and to assist in positioning volunteers where SF’s needs can be met.

Some volunteers come to SF with specific needs. For example, interns from DU work during school semesters to gain experience and/or credits they need to complete their education. Individuals from court-ordered placements, though technically not volunteers, are mandated to serve the community through participation in SF. Even in these cases, SF works hard to match the individuals with experiences that will challenge and delight them, in the hope that these individuals will stay on with SF even after their court-assigned periods are over (see Figure 7.4-9).

With all the attention given to volunteers, it is especially important that SF’s employees feel valued, appreciated, and able to progress in their chosen career pathways. They hold the organization together, and SF needs them to be action-oriented and intent on delivering high-quality service. Their personal development plans not only articulate short-term goals and functional needs but also identify future aspirations. One benefit of having a small number of employees is that the Executive Director can personally review each employee’s development plan and work with the employee and supervisor to identify resources to help the employee attain goals. The Executive Director is wired into the communities that SF serves and can often access training and opportunities that would be out of the reach of the employee without her assistance. Exit surveys have shown that the primary reason employees have left the organization over the last ten years has been for jobs that are, essentially, promotions. The size of SF limits the growth opportunities for its employees, but the Executive Director believes that supporting employees in their own growth and development—even if it means they must leave the organization—is the right thing to do.

Several of SF’s employees have broad nonprofit management experience, and they are highly regarded by other area organizations in the nonprofit sector. To ensure a smooth transition in the event of a senior leader vacancy, SF provides rotating experiences to each senior leader so that all can have regular exposure to different leadership functions. The SF board has designated the Program Director/CFO as the successor to the Executive Director in the event of short-term, temporary, or long-term absences, and the Program Director/CFO observes board meetings and planning sessions and provides additional development mentoring. The biennial SPP addresses succession planning for each of the five key leadership positions to ensure that needed skill sets exist in-house or are being developed.

SF’s Cross-Training (see 5.2a[3]) and Job Rotation Programs help ensure that the impact of employee and volunteer vacancies, absences, or, as in the case of 2003, layoffs can be absorbed by others without a disruption of services. As employees and volunteers rotate through various functions, those with leadership, relationship-building, or technical skills may request additional training, mentoring, or development opportunities. Those opportunities are discussed at quarterly, informal, brown-bag debriefing sessions.

5.1c(1) Since 2004, SF has utilized an annual survey of all employees and volunteers that includes measures of workplace safety, absenteeism, retention, recruitment effectiveness (especially of volunteers), and repeat volunteer counts for special events. The survey is the same whether the recipient is an employee or volunteer, and it focuses on satisfaction with the work environment, clarity of direction, and sufficiency of resources. A special amendment just for employees includes questions about personnel and management issues, pay equity, and support for career development. In addition, senior leaders perform walk-arounds during all shifts at the food bank. Their purpose is twofold: senior leaders share information about SF’s performance, direction, and values, and they seek input and opinions about the workplace environment and culture-in-operation.

5.1c(2) Results from surveys, walk-arounds, quarterly brown-bag debriefings, and other key human resource indicators are reviewed regularly by the Volunteer and Outreach Manager and the Executive Director to identify improvement opportunities. For example, in early 2006, volunteer absenteeism was increasing slightly. The Volunteer and Outreach Manager personally called volunteers and learned that many older volunteers were uncomfortable driving in inclement winter weather. Employees and volunteers then developed a carpool system, and absenteeism decreased. This prompted a broader leadership discussion of the “graying” of SF’s volunteer base and the need for specific strategies to recruit volunteers from different age segments.
5.2 Workforce Environment

5.2a(1) To keep the business aligned and integrated, SF identifies the necessary skills and characteristics needed by potential employees and volunteers through inputs provided to its biennial SPP and human resource planning activities, as well as through data available through the FBLC and FBA. Surveys completed by member agencies, employees, and volunteers are analyzed to identify needs and are translated into specific skills, knowledge, and abilities.

In 2004 DU student interns assisted SF with the process mapping of critical skills, jobs, and task descriptions for all SF jobs, especially those usually filled by volunteers, benchmarking practices from the FBA and FBLC. Each year, DU students assist with updating task descriptions by conducting interviews with volunteers and employees, performing job shadowing, completing rounds, and reviewing member agency comment/assessment cards. This information is shared with the FBLC to help senior leaders identify emerging skills or training needs.

Hiring characteristics are cross-referenced with all local, state, and federal regulatory requirements for job positions, whether held by an employee or volunteer. A sample of special requirements and the job for which they are needed is listed in Figure 5.2-1.

5.2a(2) SF depends on its employees and volunteers to carry out its tasks, which include delivering food to its member agencies (customers). The education and training of employees and volunteers are critical to meeting customers’ needs for timeliness/dependability. SF has had success in recruiting volunteers from throughout its service area who have diverse skills and experiences. SF’s Job Rotation Program allows this diversity to be leveraged through systematically designed processes for knowledge sharing and development.

SF uses a variety of recruitment strategies (Figure 5.2-2) that leverage its positive reputation in its communities. Community outreach and word-of-mouth are SF’s most powerful volunteer recruitment platforms.

Employees and volunteers truly represent the diversity of SF’s service area. Unless a background check reveals unfavorable findings (determined by SF’s senior leaders), no one is turned away from serving as a volunteer, although some individuals are directed toward specific types of volunteer service that best fit their abilities and SF’s needs. Volunteers serve as a very effective recruiting group; they relate positive experiences to SF’s communities and encourage family members and friends to become volunteers (see Figure 7.4-8). In addition, Program/Operations Committee members have facilitated focus groups with Hmong elders and the leaders of the Hispanic community to encourage more volunteering and partnering with these growing segments of SF’s service area.

5.2a(3) SF organizes and manages work around teams that accomplish tasks and build and promote relationships among its employees and volunteers, member agencies, donors/suppliers, partners, and other stakeholders. V-teams join together employees and volunteers, based on the skills and abilities each individual brings and the work that needs to be accomplished. Accountability is shared among employees and volunteers. As a small, non-profit organization, SF is committed to creating a workplace environment where there is camaraderie in order to successfully attract and retain volunteers, who are critical to its ability to meet its goals.

SF’s V-teams are carefully constructed for the “best fit” between people and processes through consideration of an individual’s preferences, background, experiences, education, abilities, and language proficiency. In 2003, due to the intentional shut-down of SF’s food pantries and soup kitchens, SF reduced its staff by one full-time and one part-time employee. A knowledge and skills gap resulted, so, in 2004 SF instituted its Cross-Training Development Program. With selected exceptions where special professional expertise is required, all employees and core volunteers take part in the program, which provides job variety and new learning opportunities that help spark innovation and improvements to services and processes. By expanding the pool of cross-trained workers, SF has greater agility to respond to shifting needs and business demands. It projects that 100 percent of employees will be cross-trained in 2007 (see Figure 7.4-7).

5.2a(4) SF’s cross-functional team structure capitalizes on the diversity of its employees and volunteers, and helps the organization prepare for changing capability and capacity needs. SF’s employees and volunteers (including DU students and fellows) reflect its service community and include representatives of Iowa’s growing Hispanic and Hmong communities. V-teams include people of different ages, physical abilities, educational backgrounds, and work experiences, as well as people with personal experiences with hunger and poverty. Ethnic/racial diversity is an important consideration in team formation to enhance communication and understanding of work expectations and to help ensure that all volunteers feel welcome and comfortable. For example, SF is fortunate to have individuals fluent in Spanish and Hmong on its V-teams and among its directors. These bilingual employees and volunteers have taught other team members some basic words in non-English languages and have helped SF stay aware of the special holiday observances and cultural and dietary
restrictions, when appropriate, of these growing ethnic groups, so that SF can stay sensitive to the needs of its communities.

SF’s community outreach activities include recruiting volunteers and speaking at member agency sites, church groups, health centers, career expositions, DU, IES roundtables, Greater Des Couers Area Chamber of Commerce events, meetings of political and minority groups, and other community events. SF’s employees, volunteers, and board members are involved with a host of community organizations that directly or indirectly address issues relating to hunger in Iowa (see Figure 1.2-2). This exposure to its communities provides SF with ongoing opportunities to observe and collect a spectrum of cultural and socioeconomic perspectives on area needs.

Adhering to the regulations of the U.S. Department of Labor, SF considers juveniles over the age of 14 eligible to volunteer. This gives SF access to volunteers from diverse groups such as the Boy Scouts and Girl Scouts, sports teams, and school and church youth groups. Any group with volunteers under the age of 18 is required to have at least one responsible, accompanying adult for every eight juvenile volunteers. In organized volunteer groups, area businesses also are encouraged to volunteer or participate in special event activity, such as Holiday Food Basket Programs. Once they experience working with SF as a part of a group, these volunteers are surveyed on their interests and are encouraged to join SF’s pool of volunteers.

Another approach to capacity building is SF’s relationships with the county court systems in its service area. Court-ordered placements of individuals for community service are determined on a case-by-case basis, using SF criteria and consultation with all authorities and case workers. SF’s goal is to ensure that there is no risk to employees or volunteers (especially juveniles). This program has been a success in that a percentage of those placed have often stayed on as volunteers even when their court-ordered placement requirements have ended (see Figure 7.4-9). SF has received referrals from community police departments of individuals whom they believe could benefit from experience as food bank volunteers. Senior leaders and board members believe this program has assisted the community by allowing the individuals to give back to the community by volunteering; thereby helping to prevent the individuals from becoming further involved adversely with the criminal justice system.

5.2b(1) SF is particularly well-attuned to issues of workplace health and safety because it depends so heavily on volunteers who typically are working outside their usual jobs (see Figures 7.4-14 and 7.4-15 for compliance ratings). All employees, regardless of level or function, receive special training in issues of ergonomics, safety, risk management, and emergency response. Senior leaders recognize that one of their roles is early intervention should they spot a potential risk within the workplace or observe an employee or volunteer acting in an unsafe manner. An employee, often a senior leader, is specifically accountable to screen each work area at the food bank at least daily to remove or address any potential issues. Volunteers are given opportunities at the beginning of their relationships with SF to identify any concerns, and additional issues are solicited during senior leaders’ daily walk-arounds and quarterly, brown-bag debriefings. Each V-team receives special training unique to its function. Posters are placed strategically as reminders, for example, of the proper way to lift heavy items, operate machinery, drive at the speed limit, and work at computers. If an opportunity is identified, the V-teams are empowered to regroup into PITs and begin a process improvement effort.

SF measures workplace accidents, injuries, and near misses, with special attention to work in the warehouse and transportation issues (see Figures 7.4-16 and 7.4-17). Different measures (e.g., appropriate lighting, ergonomically appropriate chair/desk/keyboard placement) are the focus for those employees and volunteers working in office locations. Absenteeism, especially the number of sick days, is tracked for all employees and volunteers who are involved adversely with the criminal justice system. Court-ordered placements are carefully screened, but SF realizes that the integration of these individuals with its employees and volunteers poses, at the least, potential concerns regarding SF’s public relations. This is especially true in work situations where juveniles are involved. Employees and volunteer leaders are consulted in advance of any court-ordered placement, and if any concern emerges it is immediately addressed by senior leaders and court personnel. The court system provides specialized training

<table>
<thead>
<tr>
<th>Figure 5.2-2 Examples of Internal and External Recruitment Strategies</th>
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<td><strong>External Recruitment Strategies</strong></td>
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<tr>
<td>Speaking engagements</td>
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<td>Meetings with ethnic/minority community leaders</td>
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<td>Fundraising activities</td>
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<td>Community outreach efforts</td>
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<td>Church events</td>
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<tr>
<td>Employee and volunteer word-of-mouth and e-mail</td>
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| **Internal Recruitment Strategies** | **Examples** |
|------------------------------------------|
| Postings | Briefings during shift changes, daily posting of SF values |
| Web site | Information on SF and how to donate, current and back issues of newsletter, nutritional information and healthy recipes |
for SF and other organizations that accept these placements and monitors performance carefully. SF has learned that, while vigilance continues to be necessary, the experiences these individuals have at SF tend to be positive. In fact, several of SF’s most loyal and productive volunteers began their experiences as court-ordered placements.

5.2b(2) SF has limitations on the resources available for benefits, as board members are aware of the contradiction in holding fund-raising activities while spending money on non-mission-critical activities. On the other hand, board members know that providing a competitive benefit structure for SF’s employee population is critical to continuing its mission. Annually, during a special meeting, senior leaders work with employees and volunteers to review the available resources and options and identify those that are of high priority. SF’s senior leaders take this information and make the tough decisions necessary for the allocation of resources to benefits. The rationale for all decisions, along with the choices made, is shared with employees during formal meetings and informal walk-around interactions.

6: Process Management

6.1 Work Systems Design
6.1a(1) and (b) In 1997, during its first strategic planning retreat, SF identified four key hunger-reducing processes (Figure 6.1-1) based on the needs of its member agencies. SF made a conscious decision to develop these processes as the core competencies it must have. During each strategic planning cycle, it assesses these four processes to ensure that they are still effectively meeting the needs of SF’s member agencies (customers), stakeholders, community segments, and donors/suppliers. SF’s hunger-reducing processes—its core competencies—carry out its mission by securing resources, producing, and delivering nutritional and balanced food products, as well as services, that are directly aligned with the requirements of its key customers, stakeholders, community segments, and donors/suppliers. The key hunger-reducing processes start with Collection Management (also referred to as “gathering”). Various resources, such as funds and volunteers, sustain the pipeline of collected products, thus enabling SF to provide food pallets, food boxes, repackaged meals, and grocery items to its member agencies. Over the past ten years, resource drives have increased about 10–12 percent per year to meet the growing demands of the food-insecure in SF’s service area (see Figure 7.5-1).

Sort and Package Management and Inventory Management are “behind-the-scenes” processes to ensure that the best foods, at the right time, are going to the right place—the member agencies that need them. These two hunger-reducing processes ensure that SF best utilizes the resources obtained during the Collection Management Process. Distribution Management prepares and delivers the collected, sorted, repackaged (if needed), and inventoried “resources.”

6.1a(2) SF uses its PDCA Process (Figure 6.1-3), linked to close attention to changing market and customer needs, to design and innovate its work systems that execute its core competencies. The identification of core competencies in 1997 has made it easier for SF’s senior leaders to determine which processes will be internal and which external: any food production happens upstream by external resources; all delivery to member agencies is downstream. This determination process is reviewed each year as part of the SPP.

6.1b(1) SF’s key work processes are identified in Figures 6.1-1 and 6.1-2a. In addition to these hunger-reducing processes, SF identifies key support processes as part of its key work processes. SF’s key support processes (Figure 6.1-2c) that relate to its core competencies are defined as those processes that enable it to effectively and efficiently supply and distribute food products to its member agencies and through them to the food-insecure. Similar to its key hunger-reducing processes, the support processes are identified during step three of the SPP (Figure 2.1-1) and are validated through annual interviews with key stakeholder groups during step six of the SPP.

6.1b(2) Key work process requirements are determined and validated using the CTQ Determination Process. Before the 2006 SPP, the requirements were limited to effectiveness and accuracy based on inputs from employees and volunteers. In 2006 the CTQ Determination Process was enhanced to include not only key hunger-reducing processes but also key support processes, and this has resulted in broader and more comprehensive requirements that relate to customer value, profitability, organizational success, and sustainability. In 2007 volunteers, employees, donors/suppliers, partners, and member agencies were included in the CTQ Determination Process for requirement identification. As a result of this enhancement, a scorecard is being developed to share with key stakeholders to ensure further alignment with them and improved metrics and customer satisfaction outcomes. This enhancement also has resulted in improved comparative data and benchmarks for learning and knowledge transfer among and between various stakeholder groups.

Figure 6.1-1 Key Hunger-Reducing Processes and Process Flow

| Collection Management (“Gathering”) | Sort and Package Management | Inventory Management | Distribution Management |

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<table>
<thead>
<tr>
<th>Key Hunger-Reducing Processes and Sub-processes</th>
<th>Key Requirements (CTQ Indicators)</th>
<th>Key Measures</th>
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<tbody>
<tr>
<td>Collection Management (&quot;Gathering&quot;) • Fundraising • Food Drives • Drop-Offs • Salvage</td>
<td>• Convenience • Frequency of events • Edible food products • Healthy foods • Variety of foods • Fundraising efficiency</td>
<td>• Average pounds of food collected per food drive, salvage, and drop-off (IP) (Figure 7.5-1) • Pounds of food collected vs. percentage edible (IP) (Figure 7.5-2) • Quality of food collected based on Nutrition Scale (IP) (Figure 7.5-3) • Effectiveness rating to meet food demands (OM) (Figure 7.5-4) • Percentage of key suppliers’ products utilized (OM) (Figure 7.5-14) • Donor (financial) satisfaction (OM) (Figures 7.2-9, 7.2-10, 7.3-10, 7.3-11) • Fundraising expenses and efficiency (OM) (Figures 7.3-6, 7.3-7) • Increases in funding and number of grants (OM) (Figures 7.6-3, 7.6-7)</td>
</tr>
<tr>
<td>Sort and Package Management • Pre-sorting • Binning • Repackaging • Labeling • Recycling</td>
<td>• Minimal waste • Minimal repackaging • Variety of packaging size • Timely and efficient use of volunteer time • Meet regulatory requirements</td>
<td>• Average percentage of packaging waste (OM) (Figure 7.5-6) • Percentage of food products requiring repackaging (IP) (Figure 7.5-5) • Percentage of repackaging time (IP) • Food labeling accuracy (IP) (Figure 7.5-7) • Sanitation and food handling and disposal compliance ratings (OM) (Figure 7.4-14) • Total pounds of paper recycled (OM) (Figure 7.6-14)</td>
</tr>
<tr>
<td>Inventory Management • Supplemental Inventory Purchasing • Nonperishable Product Rotation • Perishable Product Rotation</td>
<td>• Food and produce selection • Nutritional and balanced food products available • Supplemental products available • Fresh food products • Minimal spoilage • Meet regulatory requirements</td>
<td>• Number of food inventory turns per year (IP) (Figure 7.5-8) • Inventory days-on-hand for perishable and nonperishable food (IP) (Figure 7.5-9) • Food spoilage and errors in inventory management (IP) (Figure 7.5-11) • Percentage of time SF meets the seasonal demand (OM) (Figure 7.5-10) • Nutrition Scale (OM) (Figure 7.1-5) • Organizational capacity and efficiency (OM) (Figures 7.3-1, 7.3-2, 7.3-3) • Food spoilage and errors in inventory management (IP) (Figure 7.5-11)</td>
</tr>
<tr>
<td>Distribution Management • Repackaged Meal Preparation • Member Agency Distribution</td>
<td>• Meeting needs of member agencies • Responsiveness to requests • Timely and available food products</td>
<td>• Total pounds of food distributed (IP) (Figures 7.1-1, 7.1-2, 7.1-3) • Pounds of food distributed per person (IP) (Figure 7.1-9) • Product allocation effectiveness rating (OM) (Figure 7.5-12) • Average number of emergency food boxes distributed per week (IP/OM) (Figure 7.1-7) • Fill rate (IP) (Figure 7.1-4) • Member agency satisfaction (OM) (Figures 7.2-1–7.2-5, 7.2-7) • Member agency on-time food delivery (OM) (Figure 7.1-6)</td>
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Key: IP=In-process measure, OM=Outcome measure

**Figure 6.1-2a Requirements and Key Measures for Hunger-Reducing Processes**

| Partnerships | • Effective lead-time to meet requests • Impact and integrity • Proper food storage • Accountability • Single point of service for deliveries • Predictability of operations • Coordinated management of donations | • Inventory and Resource Effectiveness Index (OM) (Figure 7.5-13) • Satisfaction with food selections and nutritional quality (IP) (Figure 7.2-4) • Percentage of key suppliers’ products utilized (IP/OM) (Figure 7.5-14) • Level of re-engagement of suppliers (OM) (Figure 7.5-14) • Supplier/donor satisfaction ratings (OM) (Figure 7.5-15, 7.5-16) • Supplier recognition certificates (OM) (Figure 7.5-18) • Food storage compliance index (OM) |

Key: IP=In-process measure, OM=Outcome measure
Incorporating inputs on key customer, stakeholder, community segment, and donor/supplier requirements gathered during the SPP, the Program/Operations Committee, with the Program Director/CFO, determines the key hunger-reducing process requirements and capabilities to collect, sort, repackage (if needed), inventory, and distribute nutritional food. These key process requirements are based on the value that each of the hunger-reducing processes brings to SF’s member agencies and are viewed as CTQ indicators. Key requirements and measures for key work processes are identified in Figures 6.1-2a and 6.1-2c.

6.1b(3) The CTQ Determination Process, outlined in Item 3.1a(2)–3.1a(4), is conducted annually using a focus group of partners, donors/suppliers, core volunteers, and member agencies. This process enables the Program/Operations Committee to effectively and systematically gather the voices of these stakeholders and to distill various issues/concerns into verifiable and actionable process requirements. The CTQ Determination Process, along with the PDCA Process, is used to design and innovate all the work processes. Cycle time, productivity, cost control, and other efficiency and effectiveness factors are considered and incorporated into the design of work processes as CTQ factors.

During step one of the PDCA Process, issues or problems are assessed. A determination, using input from member agencies, suppliers, and partners, as appropriate, is made whether the issue is based on and/or is part of one of the hunger-reducing processes or if it may require more research and/or the development of a new process.

6.1c Because much of SF’s service area is located in a part of the Midwest called “tornado alley,” local government agencies conduct for the region annual mock disaster drills in which SF participates (see Figure 7.5-17). The warehouse, which sits in a protected area from wind and flood damage, is often “command central,” as designated by the Federal Emergency Management Agency (FEMA), and serves as a regional distribution center for key disaster supplies. In these drills, SF has access to emergency gas generators provided by a neighboring company within the United Iowa Agencies (0.5 miles away) to ensure the continuation of re-
frigeration units for perishable food products and continued operation of RICE. In addition to these annual drills, SF conducts quarterly mock emergency events with employees and volunteers to measure and ensure readiness. These events include power outages, product spills, warehouse and kitchen accidents resulting in an injury (e.g., falls, electrocution, burns, heart attacks, and choking), and transportation accidents (off site). After each event, the key learnings and improvements are documented and shared with employees and volunteers through quarterly brown-bag debriefings, the newsletter, bulletin board postings, and e-mails. These events have proven to be excellent improvement opportunities for employees and volunteers, have resulted in increased awareness of safety and a reduction in volunteer injuries since the start of the drills in 2001 (see Figures 7.4-16 and 7.4-17), and have increased the cooperation of FBLC food banks across the region.

6.2 Work Process Management and Improvement

6.2a(1) Consistent and systematic use of the PDCA Process enables SF to ensure that its four hunger-reducing processes are meeting the CTQ indicators (design requirements). A team-based (involving both employees and volunteers), seven-step PDCA Process (Figure 6.1-3) enables ongoing process management and improvement activities, as well as new process identification and design. When a target is not met for a key process, individual or Process Improvement Team (PIT) action is required using PDCA.

Step two, which was a recent enhancement to the PDCA Process, requires that processes and subprocesses be fully mapped and posted in the work areas of the food bank. Recently, employees and volunteer leaders who have participated on PITs and the Program Director/CFO attended a three-day workshop from the local U.S. Excellence and Quality Group chapter on the value of creating SIPOC Diagrams (see Glossary) and Process and Value Stream Maps for reducing waste and redundancy in the workplace and for transferring knowledge and training. Whenever possible, creation of these diagrams and maps has been incorporated into step two of the PDCA Process and has led to significant improvements in SF’s Inventory Management and Distribution Management Processes, as well as volunteer readiness in those areas. SF plans to fully diagram and map the Collection Management, as well as the Sort and Package Management Processes, too. Once mapped, process documents will be posted in work areas to assist in training and standardization.

During steps four and five, a PIT that may include volunteers as well as employees identifies, evaluates, and incorporates appropriate and cost-effective new technologies and methodologies into the process, when appropriate. Factors relating to cycle time, productivity, cost control, and process efficiency and effectiveness are identified and are factored into reviews and measurements (step six). Before any major change to a hunger-reducing process is implemented, specifications and expected outcomes are reviewed by employees, volunteer leaders, the Program/Operations Committee, and senior leaders. The assessment and implementation of the RICE system in 2005 is a recent example of the power of a PIT and the PDCA Process. Before 2003, only six inventory turns of food were completed each year, and SF had a 13 percent spoilage and waste rate of perishable products (see Figures 7.5-8 and 7.5-11). A PIT identified a Web-based inventory control solution called RICE that was specifically designed and marketed for nonprofits and had a special feature for food bank inventory management. The system was being used successfully by fellow FBLC member Food Reservoir of the Plains, which shared the system with SF. Since the implementation of RICE, inventory turns have increased to ten per year and are projected to increase to 11 per year in 2007 (see Figure 7.5-8). Because of this, perishable spoilage has been reduced to no greater than 5 percent. The Program Director/CFO is currently working on a process with member agencies that would allow them to use RICE to order food directly via the Internet, which would reduce invoice paperwork and improve fill rates.

The PDCA Process ensures that each of the hunger-reducing processes has IP and OM performance measures (see Figure 6.1-2a), which are used to track, manage, and meet process requirements. IP measures are tracked daily, weekly, or monthly, and they are updated on the Daily Harvest or Monthly Harvest dashboards (Figure 4.1-2). In addition, a number of the measures are part of the Balanced Plate Scorecard (Figure 4.1-1), and all measures are regularly evaluated by senior leaders. Because many of the measures reflect the contributions of SF’s volunteers and corporate contributors, they are posted in work areas, are included

**Figure 6.1-3 Team-Based PDCA Process**

**PLAN (steps 1–4)**

1. Describe the problem/issue.
2. Document the process (map and diagram).
3. Identify and verify root cause(s).
4. Develop a solution and an action plan.

**CHECK (step 6)**


**DO (step 5)**

5. Implement the solution.

7. Reflect and act on learnings (i.e., improve).
in daily walk-around discussions, and are shared in the Share Food for Thought newsletter so that donor partners can read about SF’s successes, as well as its challenges. The innovative incorporation of a community needs “check” in step six ensures that SF is balancing value for its member agencies.

Key measures used for the control and improvement of SF’s key work processes are identified in Figures 6.1-2a and 6.1-2c. Through the PDCA Process, each measure is aligned to one or more CTQ indicators, and both in-process and outcome measures are identified. These measures are then used to manage the processes and are posted in work areas for employees and volunteers to review. One PIT, working with the Program/Operations Committee, is developing a scorecard, based on the CTQ indicators and measures that it has helped establish, to share with donors/suppliers and partners.

6.2a(2) As part of step six (review, evaluate, and measure), SF’s employees and volunteers are constantly looking for ways to minimize overall costs and eliminate rework. Several key areas (i.e., kitchen sanitation and food handling) within the Distribution Management Process have rigorous inspections and audits by local and state health agencies to ensure compliance with health and safety guidelines. For example, in 2003, several volunteers who repackage meals and the employee Kitchen Supervisor attended food science and handling workshops. They used knowledge gained from the workshops to implement new processes for kitchen sanitation and food handling. The Des Couriers Health Department, part of DHFS, identified these processes as “best practices,” which has increased donations to SF by local and regional government agencies. SF has since exceeded regulatory requirements in these areas (see Figure 7.4-14), and it is in the process of using the RICE system’s automatic (built-in) checklist to further streamline the Inventory Management Process and repackaging time.

Similarly, employees and volunteers are continuously seeking ways to reduce the costs associated with inspections, tests, and audits. For example, with enhancements to key work processes through training, process posting, and the sharing of metrics, as well as the implementation of the RICE system, inspection and audit time have been reduced by 25 percent, which is a component of the effectiveness rating (see Figure 7.5-4). In addition, enhancements to SF’s fleet, using the Transportation and Logistics Process, also have improved fuel efficiency, and therefore overall miles per gallon, which is significant due to the still-rising cost of gas (see Figure 7.5-23). New and innovative ways are being developed to reduce rework and cycle time in transportation and delivery processes, especially for when new or inexperienced employees or volunteers are assisting with those areas.

6.2b Work processes are designed to meet CTQ requirements through the consistent and systematic use of the PDCA Process. Step seven of the process enables ongoing process management and improvement activities, as well as new process identification and design. To ensure that process designs are robust and meet the CTQ indicators, the planning portion of the PDCA Process was enhanced through extensive involvement with stakeholder groups through the gathering of their input and concerns and their engagement in the design and deployment of each of the key work processes. This level of engagement has been very time-consuming for several of SF’s senior leaders but has resulted in greater agility and overall results, especially in regard to strengthened partnerships. During 2006, each key work process underwent a thorough redesign to ensure that it had appropriate and effective CTQ indicators. Before the implementation of process changes, employees and volunteers receive adequate training and understanding of the process and related CTQ indicators. In addition, each process is documented, and appropriate process maps and measures are displayed for further alignment and knowledge sharing.

To continue to improve the performance of SF’s key work processes, an informal, semiannual review has been implemented in step seven of the PDCA Process. A senior leader conducts the review with other employees, volunteers, and partners, and all involved reflect on performance and identify key learnings and improvement opportunities. These improvement opportunities are assessed, turned into action plans, and prioritized by a PIT, as well as by the Program/Operations Committee. If the improvement can be readily implemented without impact to donors/suppliers, partners, or member agencies, SF moves forward with an action plan to address the opportunity and monitor its impact. Other opportunities that may require further research and resources are incorporated during the next SPP and brought through the rigors of the PDCA Process, as appropriate.

In addition to looking for ways to reduce costs and rework, SF’s employees and volunteers continuously look for ways to improve the performance of its processes (see 6.2b). If an action plan for improvement will not have an adverse impact on donors/suppliers, partners, member agencies, other key stakeholders, or community segments, it is implemented and monitored.

7: Results

7.1 Product and Service Outcomes

7.1a Feeding the hungry residents of its communities is SF’s key service, and, since 2003, SF’s food distribution has doubled. As a result of SF’s expanded food collection and waste reduction efforts (see Item 7.5), more donated food was available for distribution. To gauge its performance, SF compares itself locally against IFBA data (when available) and nationally with FBA comparisons. For certain metrics, it also compares itself regionally using FBLC data from sister food banks.

Figures 7.1-1 through 7.1-4 are measures of food availability. The data have been normalized in terms of comparisons. Figure 7.1-1 shows the aggregate growth of SF food distribution (total for all counties) over the past four years. The 7.5 million pounds distributed in 2006 makes SF the largest food bank in the IFBA for this measure. Food distribution is segmented by SF’s rural and urban counties in Figure 7.1-2.

The amount of food distributed to each member agency has increased over the last four years. Figure 7.1-3 shows examples of this increase at three sample member agencies. These results are an indicator of the effectiveness of SF’s partnership activities
with these agencies. In 2004 SF partnered with WellnessBase and community summer day care and parks programs throughout its six counties to deliver nutritious lunches to children throughout the summer. The result is shown in the increased food distribution for WellnessBase from 2004 to 2006.

SF’s Fill Rate (Figure 7.1-4) to member agencies is an additional measure of food availability, and it measures the percentage of food (in pounds) from SF’s weekly orders that are delivered to member agencies. In 2005 SF’s perishable and nonperishable foods were separated in the warehouse to improve the flow of orders. These improvements resulted in a 95 percent fill rate in 2006, which made SF the best food bank for this measure in both the IFBA and FBLC.

Access to nutritional food is a key customer requirement (see Figure P1-4). The Nutrition Scale (Figure 7.1-5) is a scale of the nutritional value and overall food variety provided by SF in each member agency shipment. In recent years, SF has focused on ensuring that its food has more nutritional value than in past years and thus can better meet the diverse nutritional needs (e.g., for the elderly, newborns, pregnant or nursing women, and children) conveyed by member agencies of the people who use their services—the food-insecure. This focus is being accomplished through improved partnerships with key donors/suppliers who are providing more fresh and locally grown fruits and vegetables. SF measures its distributed food products’ and repackaged foods’ nutritional value utilizing a ten-point nutritional scale developed by the American Association of Food and Nutrition for a Healthier America (AAFNHA). Using the scale, a food bank can determine if its food meets all ten criteria of AAFNHA for nutritional value.

SF cooperates with member agencies to get food to those most in need. Member agencies expect timely deliveries (Figure 7.1-6) and the food they ordered (Figure 7.1-4). For both these measures, SF is considered the best in the IFBA. In 2005 SF obtained a new truck, and in 2006 the van was replaced. These actions led to on-time food delivery improvements from 78 percent in 2005 to 92 percent in 2006, which was the best performance in the IFBA and approaching the national best. In response to a dip in SF’s fill rate in 2004, the PDCA Process was initiated and volunteer efforts were focused on the presorting process in SF’s warehouse. As a result, the fill rate to member agencies was increased to 95 percent in 2006, which made SF the best in the IFBA and...
In addition to large volumes of food items, SF provides nutritionally balanced, emergency food boxes to its member agencies for distribution directly to the food-insecure. During the 2002 SPP, SF identified as both a threat and challenge the growth in food-insecure Hmong and Hispanic populations in both its rural and urban counties. As a result, emergency food boxes were developed, in consultation with member agencies, to suit their cultural tastes. This service is measured by the number of emergency food boxes distributed per week (Figure 7.1-7). Each food box contains a two-day supply of nutritious food for four people. The number of emergency food boxes distributed rose from 180 in 2003 to 729 in 2006, which made SF the largest provider in the IFBA.

Over the past three years, SF has improved food-gathering efforts and reduced spoilage (see Item 7.5). Over the same period, local economic conditions in its six communities have worsened and unemployment has increased. SF’s food distribution has needed to increase to meet the need, and its number of unduplicated food-insecure client contacts (as measured by the unduplicated number of food-insecure who use SF’s member agencies’ services) has grown by over 75 percent between 2003 and 2006 (Figure 7.1-8). New client contacts for all age segments also have increased over the last four years. Additionally, SF’s pounds of food distributed per person have increased (Figure 7.1-9). Through aggressive partnership activities to increase the amount and stability of food donations, SF has been able to outpace the growth in its member agencies’ client base and increase the pounds distributed per person.

One of SF’s key services is to provide information to its employees, volunteers, member agencies, stakeholders, community segments, partners, and donors/suppliers via its Web site (see Figure 3.1-2). The increase in SF’s weekly Web site traffic (Figure 7.1-10) is the result of expanded information and online services in 2005 and 2006. Over the past two years, SF has provided healthy recipes and nutritional information to its member agencies via its Web site. Figure 7.1-10 also shows the increase in downloads and Web site hits for nutritional information. These Internet efforts augment SF’s personal employee and volunteer contacts with member agencies.

As part of its efforts to increase food donations and raise general awareness regarding hunger, SF has targeted local news outlets (e.g., community newspapers, radio, and TV) in its six-county service area. SF’s Development Director has established relationships with the news and feature editors in each outlet. As a result, SF has been able to use targeted media releases and public serv-
ice announcements to maximize potential coverage of special events (e.g., food drives, new donors) and hunger-related news that affect each local community. Results of these efforts are shown in Figure 7.1-11.

SF’s key customers (member agencies) are the delivery points at the end of the food distribution supply chain. SF’s success as a food bank is directly linked to the success of each member agency. To support member agency success, SF opens its LDP (see 1.2c) to representatives of other nonprofit organizations, especially its member agencies and its partners (Figure 7.1-12). After a successful pilot program in 2002, DU students and SF fellows assisted SF with three evaluation and improvement cycles for the LDP. These improvements have contributed to the increased participation rates.

**7.2 Customer-Focused Outcomes**

7.2a(1) SF uses a variety of surveys (including the comment/assessment cards that go out with every member agency delivery) and communication methods (see Figure 3.1-1) to determine the satisfaction and dissatisfaction of its multiple stakeholder groups, as well as their perceived value of its services. Figures 7.2-1 through 7.2-11 show the results of numerous surveys and information-gathering methods on the key drivers of satisfaction and dissatisfaction for its customers (member agencies), financial donors, and communities (see Figures 7.5-15 and 7.5-16 for satisfaction results for other donors/suppliers). SF compares its stakeholders’ satisfaction, when possible, to that of the best food bank in the state (IFBA) and in the region (FBLC). For some of the following measures, SF is considered the best.

The key drivers of satisfaction for member agencies are timeliness/dependability, communications, hours of operation, and food selections and nutritional quality. Timeliness/dependability is a key to serving the food-insecure, especially because being on time may mean having hot meals available for the hungry. Figures 7.2-1 through 7.2-5 and 7.2-7 show segmented results for three representative member agencies. Other segmented results are available on site. Figure 7.2-1 presents results of member agencies’ satisfaction with SF’s timeliness/dependability, based on comment/assessment cards returned to SF. SF’s member agencies and the food-insecure need to know that SF will be
there in times of tornados and other disasters in the area to pro-
vide food; the well-being of the food-insecure depends on it. SF’s
new truck in 2005 and new van in 2006 greatly improved actual
on-time food delivery (Figure 7.1-6).

Because the member agencies’ client base (the food-insecure)
changes often, with food-insecurity new to many families, com-
unication provided by SF about member agencies’ hours and
locations is very helpful to feeding the hungry, according to
member agency comment/assessment cards. For the measure of
member agency satisfaction with communications, SF is the best
food bank in the IFBA for this measure (Figure 7.2-2). Not all of
the food-insecure have access to the same media (e.g., television
or Internet services). Therefore, SF has worked to build rela-
relationships with churches, libraries, radio stations, and local newspa-
pers to provide public service announcements (Figure 7.2-8).
Volunteers post posters/fliers in laundromats, convenience stores,
churches, libraries, and other locations they often visit. In addi-
tion, in late 2004, the SF Web site began providing information
on hours of service and maps to the SF member agencies.

SF also measures member agency satisfaction with its hours of
operation (Figure 7.2-3).

As the ethnicity and populations served continually change in
SF’s six counties, SF has had to listen to its member agencies
who measure and monitor the satisfaction levels of their various
client segments; SF uses these data to ensure that it is providing

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**Figure 7.2-4 Satisfaction With Food Selections and Nutritional
Quality**

- **2003**: 65%, **2004**: 70%, **2005**: 75%, **2006**: 80%, **2006 IFBA Best**: 85%

  - WellnessBase: orange, SeniorApproach: green, Assist Each Other: purple

**Figure 7.2-5 Overall Satisfaction of Member Agencies**

- **2004**: 80%, **2005**: 85%, **2006**: 90%, **2006 IFBA Best**: 95%

  - WellnessBase: orange, SeniorApproach: green, Assist Each Other: purple

**Figure 7.2-6 Overall Number and Type of Complaints Received**

- **2002**: 10, **2003**: 15, **2004**: 20, **2005**: 25, **2006**: 30

  - Availability of Food Items Stocked: red, Hours of Access: black, Food for All Ages: green, Courtesy of Volunteers: purple, Location: yellow, Variety of Food Items: pink, Quality of Food Items: blue

**Figure 7.2-7 Likelihood to Refer Others to SF**

- **2003**: 50%, **2004**: 55%, **2005**: 60%, **2006**: 65%, **2007 (Prox.)**: 70%

  - WellnessBase: orange, SeniorApproach: green, Assist Each Other: purple

**Figure 7.2-8 Ways SF Provides Information to the Food-Insecure**

- **2003**: 90%, **2004**: 95%, **2005**: 100%, **2006**: 95%

  - Fliers and Announcements Made at Churches: red, Radio/TV Public Service Announcements: blue, Word-of-Mouth: green, Fliers Posted at Other Locations: purple, Web Site: yellow
desired foods. For example, according to member agency data, the growing Hmong population desires more rice and fresh vegetables. Through comment/assessment cards, SF measures customers’ satisfaction with its food selections and nutritional quality (Figure 7.2-4). Some member agencies, but not all, provide satisfaction data segmented by ethnicity.

By considering member agencies’ satisfaction with timeliness/dependability, communications, hours of operation, and food selections and nutritional quality, SF calculates the overall satisfaction of its member agencies (Figure 7.2-5). As many of these agencies may use competitive services, SF considers it very important to determine the customer satisfaction of its member agencies compared to the customer satisfaction of other food banks providing the same services throughout the state.

Complaint data are gathered by employees and volunteers (see 3.2a[3]) and are used to help determine areas of improvement. In 2005 the highest need, based on complaints, was more availability of food items in stock. The implementation of RICE that same year helped employees and volunteers more quickly locate and track inventory and ultimately meet the increasing food needs of the area. While the number of complaints may appear to be fluctuating, as a percentage of those served, complaints are actually decreasing in all areas (Figure 7.2-6). Figure 7.2-7 shows the likelihood that member agencies, employees, and volunteers would refer other agencies to SF.

7.2a(2) Figure 3.1-2 shows some of the ways that SF communicates with its stakeholders and throughout its communities to ensure that the food-insecure can find the services they need. SF’s Web site, which went live in late 2004, is a key method for reaching the food-insecure, as it lists SF’s and member agencies’ hours of service, directions, and information on becoming a volunteer. Figure 7.2-8 shows additional ways that SF provides information to the food-insecure.

Financial donations are extremely important to the success of SF. As charitable giving to food banks has decreased nationally in recent years (according to FBA data), SF has worked very hard to ensure that its donors feel SF is doing a great job (Figure 7.2-9), that the number of contributors grows, and that those giving continue to give each year. SF also measures the number of years that donors have been giving to SF, as well as their level of giving, as a key indicator of donor satisfaction (Figure 7.2-10). SF wishes to continually attract new donors, who often enter at the lower levels of giving. A key to success is keeping those donors and increasing the amounts given.

SF considers community segments, such as taxpayers, to be key stakeholders, so it annually surveys its six counties to determine how well its communities think SF is providing needed services. As the results indicate, SF’s communities are strong supporters of SF and the services it provides to hungry Iowans (Figure 7.2-11). SF’s community survey also has yielded some improvement opportunities. For example, the survey showed that respondents felt that some food-insecure children were not getting the nutritious meals they needed during the summer. While schools provided free or reduced-cost meals for children during the school year, adequate services were not available for the summer months when children were not in school. A partnership with WellnessBase, which focuses on providing congregate meals to children, was formed in 2004 to provide additional meals during the summer months.
While not a data-driven measure, the verbal thank-you's that SF receives from those it serves keep employees motivated and volunteers coming back to SF to help those in need.

7.3 Financial and Market Outcomes

7.3a(1) To measure its financial performance, SF looks at two broad indicators: organizational capacity (Figure 7.3-1) and organizational efficiency (Figure 7.3-2). These indicators are quantitatively benchmarked against the ratings of Assistance Now Finder, which rates the financial health and efficiency of U.S. nonprofit organizations, including food banks, to demonstrate industry standards and leadership. Figure 7.3-3 demonstrates SF's overall score, which is developed by combining the scores from organizational capacity and efficiency. The range for this indicator is 0 to 70.

Three indicators make up the score for organizational capacity (Figure 7.3-1): primary revenue growth, program expenses growth, and working capital ratio. Definitions of each measure are provided in the glossary of this application. Definitions of each measure are provided in the glossary of this application. Primary revenue growth is an indicator defined by the revenue, including any revenues from services, grants, and donations, that SF generates through its work. This factor is computed through Assistance Now Finder's nationally recognized formula considering a period of three to five years. For example, economic conditions from 2000 to 2004 impacted the donations to charitable organizations nationwide, and growth was slow. Primary revenue growth is an indicator that directly reflects the state of the economy. The year 2004 was the first since 2000 in which charitable donations rose. During 2005 and 2006, SF's primary revenue growth ranged from 6.3 percent to 7.25 percent.

Program expenses growth calculates the average annual growth of program expenses over a period of three to five years. SF's current performance (and financial viability) is significantly ahead of other food banks and charities due to its Corporate Contributor Program that offsets its overhead. SF has been able to spend 87.9 percent of its operating budget on direct program expenses, which means that it is living its mission by dedicating so much directly to feeding the hungry residents in its communities.

The third indicator that is included in organizational capacity is working capital ratio. This indicator establishes the period of time (in years) that SF would be able to operate at its current level of spending using only its assets. Since the greater part of a food bank's assets are donated food items and other perishables, there is only a small amount of working capital. For the food bank industry, according to the FBA, the median for this indicator is 0.08 years, or less than one month. With corporate sponsorships from the Corporate Contributor Program, SF operates at a much more favorable 0.7 years. This is a key indicator for SF to monitor its sustainability and continuity of business.
Organizational efficiency (Figure 7.3-2) includes the performance of four indicators: program expenses (Figure 7.3-4), administrative expenses (Figure 7.3-5), fundraising expenses (Figure 7.3-6), and fundraising efficiency (Figure 7.3-7). Program expenses (Figure 7.3-4) are an indicator that demonstrates the percentage of the total budget that SF spends on implementing its mission and vision. The higher the percentage of the total budget spent on programs and services, the better. This indicator is aligned with organizational efficiency (Figure 7.3-2). Assistance Now Finder’s research demonstrates that nine out of ten national food banks evaluated spend at least 80 percent of their total budget on services and programs related to their missions and visions. For SF, corporate contributors positively impact this indicator, allowing a greater percentage of the budget to be directed to the mission and vision. Considering its vision and Assistance Now Finder’s research, SF has set a goal of 90 percent in FY2007 for this indicator, which would place it as “best-in-class” in the nation. A long-range goal of SF is to increase corporate sponsorships to ten by FY2010.

Administrative expenses (Figure 7.3-5) are the total amount of a food bank’s budget that is spent on management and general expenses. A lower percentage demonstrates a better score. Assistance Now Finder’s exceptional rating for food banks is 9–12 percent.

Fundraising expenses (Figure 7.3-6) are the total working expenses spent on fundraising. As with many of the indicators, the lower the score the better. SF currently operates at 2.5 percent (Figure 7.1-1), which exceeds the industry standard for charities. Fundraising efficiency (Figure 7.3-7) is the percentage of budget spent to raise one dollar.

Figure 7.3-8 displays SF’s performance in comparison to four food banks that, along with SF, are part of the FBLC and that use Assistance Now Finder for benchmarking purposes. While SF, at three stars, is in the mid-range of this group, comparisons that demonstrate learning and growth opportunities have been selected. This peer group offers SF a competitive opportunity for regional comparisons in financial performance and organizational capacity.

Figure 7.3-9 represents the financial resources needed to deploy SF’s mission. Revenues are generated through many sources: corporate contributors, private donations, foundations, bequests, fundraising events, significant donations from individuals, and
direct-mail donations, which are generated through personal contact, from Web-based contacts, and through the Share Food for Thought newsletter. Figure 7.3-9 demonstrates SF’s consistent growth over a five-year period. In 2003 the amount of grants and donations SF received did decline, but the amount is now trending favorably, with continued growth projected in FY2007.

7.3a(2) As a food bank, SF depends on the relationships that it builds with its many customers, stakeholders, community segments, and donors/suppliers (see Figures P.1-4 and P.1-5). Within these relationships and collaborations, SF must build trust in its general and financial operations. This ensures its market performance. Although SF is not required to do so, in 2004 it began implementing aspects of the Sarbanes-Oxley Act with the help of DU students. SF surveyed a representation of its member agencies, corporate contributors, volunteers, and donors/suppliers using a five-point Likert Scale. Figure 7.3-10 represents SF’s performance in relation to six performance measures. A score of 80 equals “meets expectations” and 100 represents “exceeds expectations.”

A key indicator of marketplace performance and sustainability is the total number of gifts and donors (Figure 7.3-11).

7.4 Workforce-Focused Outcomes

7.4a(1) SF is proud to be a leader in the nonprofit community in the amount of training and learning opportunities offered to its employees and volunteers, which contributes directly to a high level of workforce engagement. The number of training hours (Figure 7.4-1) completed is significant considering the small number of SF employees and those employees’ multiple roles in the organization. Any volunteer can request training. Volunteers who are members of V-teams or PITs are given priority (over volunteers who just do one or two special events per year) for key training.

SF continues to build the skills of its employees and volunteers to ensure that critical operational functions are maintained in the event of absences. In addition, many employees and volunteers

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*Bold scores are the best in the FBA.*
receive yearly advanced technical training for special certifications (Figure 7.4-2).

Workforce (employee and volunteer) satisfaction with SF’s training efforts is seen in Figure 7.4-3. As training effectiveness has improved, there has been a continuous decrease in the number of employee and volunteer accidents and injuries (Figure 7.4-4). In 2007 SF projects that it will be the best in the FBLC for this measure. For more specific details on accidents and injuries, please see Figures 7.4-16 and 7.4-17.

SF’s employees and volunteers impact many lives on a daily basis; in the past several years, there has been a steady increase in previous recipients of SF’s products and services (food-insecure, member agency clients) becoming active volunteers (Figure 7.4-5).

SF’s senior leaders work hard to create a satisfying and meaningful work environment, and they have implemented a number of approaches to motivate, empower, recognize, and show appreciation for employees and volunteers (see Figure 1.1-2). Volunteer retention (Figure 7.4-6), length of service (Figure 7.4-6), and referrals of family and friends (Figure 7.4-8) are additional measures SF uses to track volunteer satisfaction and well-being. Figure 7.4-6 shows a declining trend in retention of volunteers who have given more than five years to SF. The organization attributes this to the “graying” of its volunteer base (in 2006 nearly
half of its 521 volunteers were over the age of 55) and considers the recruitment of volunteers from a broad range of age segments a strategic challenge.

Workforce and leader development and the percentage of employees and volunteers crossed-trained (Figure 7.4-7) are critical to the success of SF’s hunger-reducing processes. Training effectiveness is measured by the mentor’s observation of the trainee, proficiency checklists signed off by the mentor, brown-bag debrief sessions, and tests, often electronic, that are tied to the training. In 2003, due to its renewed focus on food banking, SF reduced its FTEs by one full-time and one part-time employee. Based on its learning about knowledge gaps due to these cut-backs, SF developed the Cross-Training Development Program in 2004. Since then, overall training effectiveness has shown significant improvement. In 2006 SF was considered the best in the FBLC for training effectiveness, and it projects it will be the best again in 2007. SF also projects that in 2007 it will be the best in the FBLC for percentage of employees cross-trained.

SF works with court-ordered placements in consultation with authorities (county and judicial officers, law enforcement personnel, and parole and social services personnel) and case workers. This program has been a success in that a percentage of those placed have often stayed on as volunteers even when their court-ordered requirements have ended (Figure 7.4-9).

7.4a(2) As a small organization with limited resources and only 10.5 FTE employees, SF relied heavily on its volunteers to help distribute some 7.5 million pounds of food in 2006 to its member agencies in a six-county service area. SF utilized more than 500 volunteers, with 20 volunteers committing to more than 11 hours per week for core daily operations. Included in the pool of total volunteers are many business groups, youth and church groups, individuals who participate in single events or projects, such as the Holiday Food Basket Programs at Thanksgiving and Christmas, and corporate contributors who provide pro bono work. Figure 7.4-10 shows SF’s annual volunteer population segmented by county residences, special groups, and ages.

According to surveys, volunteers think that SF is a great agency in which to work, and there is a sense of pride, ownership, and dedication by all to feed the hungry. Although daily volunteer levels are fairly stable, SF has experienced an increase in overall
time that volunteers spend working at the food bank. Figure 7.4-11 shows the average hours spent per month by core volunteers (20 in 2006) who are active in SF’s daily operations; this amount consistently exceeds the average amount of all FBLC food banks. Special events and other campaigns attract individuals and groups of volunteers from SF’s communities. These volunteers come from the corporate sector, local schools, DU, government agencies, foundations, churches, and other groups. Groups vary in size and resources depending on the event, so SF counts the number of nonduplicated groups that partner with it each year (Figure 7.4-12). The number of new individuals and groups that seek volunteer opportunities at SF also is tracked to measure the effectiveness of volunteer recruitment efforts (Figure 7.4-13).

7.4a(3) As a food bank, SF is continuously monitoring and being monitored by various county health departments and state agencies, such as the DHFS (see Figure P.1-3), for its sanitation, safe food handling and disposal, and safety compliance ratings (Figures 7.4-14 and 7.4-15). The Record Compliance Index is an FBA protocol. For FY2007, SF is on track to exceed its strategic objective of reaching 95% adherence to the FBA index measures.

The workforce climate and well-being of employees and volunteers are top concerns for SF that are reflected in its values. Safety training is an essential component of orientation and quarterly brown-bag debriefing sessions, and employees and volunteers are equipped with appropriate safety equipment. Thanks to a partnership with a key supplier, Linda Foods Corporation, work areas are undergoing ergonomic and safety audits at no cost to SF. Linda Foods also distributed free first-aid kits to all employees and volunteers who participated in recent safety training on correct lifting. Employees and volunteers are invited to participate in Linda Foods’ free flu-shot program. Because SF measures workplace accidents, injuries, and near misses (as appropriate), with special attention given to work in the warehouse and transportation issues, Figures 7.4-16 and 7.4-17 show data on the number of accidents and injuries in these areas.
Employees and core volunteers are occasionally absent and are asked to notify their supervisors, mentors, or volunteer leaders so that appropriate work coverage can be arranged. Sometimes ongoing absentee calls are indicators of dissatisfaction or burnout, or they may indicate an illness or transportation problem. Employee supervisors and volunteer leaders follow up on unreported absences of employees and volunteers. The number of absentee days per year are shown in Figure 7.4-18 and are an indicator of workplace health. Absenteeism segmented data by employee, volunteer, and type of volunteer are available on site.

7.5 Process Effectiveness Outcomes

Although SF is a small organization, it has identified numerous key process metrics that are required because of its association with and membership in the FBA, FBLC, and IFBA. In addition, SF identifies metrics that help it to ensure that it is providing the best possible foods, at the right time, and to the right place. Several of these measures have been implemented at the request of employees and volunteers who want to be able to track improvements. All of SF’s process measures are posted in work areas for employees and volunteers to review.

7.5a(1) One of SF’s hunger-reducing processes, Collection Management, comprises four key methods for food and monies to be collected: fundraising, food drives, food salvage, and food product drop-offs. SF tracks collected and salvaged food products (both perishable and nonperishable) by average pounds collected per food drive, salvage, and drop-off (Figure 7.5-1). In 2006 SF collected a total of 8.12 million pounds of food from these three sources, an amount that is approaching both the FBLC and the FBA best. (See Figures 7.3-6 and 7.3-7 for fundraising results.)

SF’s ultimate collection goal is to provide the most edible food products and repackaged foods as possible to its member agencies by reducing the un-utilized pounds. Figure 7.5-2 demonstrates the correlation between pounds of food collected and the percentage of pounds of edible food (i.e., food distributed and used by member agencies). Over the past four years, the percentage of edible food collected has improved an average of about 25 percent as a result of more effective collaboration with key suppliers, better refrigeration in the warehouse, implementation of the RICE system, and employee and volunteer training. Figure 7.5-3 shows the average quality of food collected based on AAFNHA’s Nutrition Scale; this collected food is combined with food from donors to
come up with the total nutritional value of SF’s food, which is shown in Figure 7.1-5. Because of SF’s efforts in collecting and raising the nutritional value of its food, the total pounds of food distributed per year have continued to increase (Figure 7.1-1).

As the population, especially the Hmong and Hispanic segments, in SF’s service area has grown and as requests from member agencies for more nutritional foods have risen, SF has had to find ways to meet these growing demands for food sources. Through additional collections and fundraising, SF has been able to more than double its ability to meet these demands since 2003 (Figure 7.5-4). In 2005 and 2006 its effectiveness rating became the best in the FBLC, and in 2007 it is projected to be approaching the best in the FBA.

Each food product, once it has been received within SF’s warehouse, must be sorted and potentially repackaged for distribution. Through significant collaboration with key suppliers, such as Platinum Foods, Blue Troll, Inc., and Linda Foods Corporation, SF has reduced the overall percentage of food products requiring repackaging. If repackaging is needed, member agencies and volunteers, including dieticians and nutritionists from the communities served, work with SF to determine which foods are nutritious and to balance the food that goes into the meals, based on the needs and requirements of the particular member agency. In addition, SF converts products (perishable and non-perishable) that are reaching the end of their shelf-lives into repackaged meals. This practice has aided in reducing inventory spoilage overall, as well as providing enhanced menu options for member agencies. (See Figure 7.2-5 for the member agencies’ increased satisfaction with SF’s food selections.) Because repackaging introduces potential product waste, SF has been able to continuously reduce the need to repackage and the overall food product waste during repackaging (Figure 7.5-5).

SF utilizes significant cardboard, wooden pallets (added to recycling efforts in 2005), and plastic wrapping in its warehouse and food distribution processes. Reducing packaging waste continues to be a focus of SF’s employees and volunteers (Figure 7.5-6), as each one percent of packaging waste translates into an average of 2,000 pounds of potential wood or paper recyclable materials. In 2007 SF projects that it will be able to reduce its packaging waste to just 5 percent, which would make it the best food bank for this measure in the regional FBLC.

As products are sorted and repackaged, if needed, SF must ensure appropriate labels for each food product. According to the DHFS, any food product that will be distributed in any form to member agencies must contain the following elements: product name, nutritional value, ingredients, weight or volume, package date, use by date, repacked by (name), contact information, and bar code for tracking purposes. SF monitors its food labeling accuracy (Figure 7.5-7), and all labeling errors identified are corrected before product distribution.

After food products have been sorted and labeled, they must be entered into the Rapid Inventory and Control Enterprise (RICE)
All products and product packaging are bar-coded, enabling rapid entry into RICE by warehouse employees and volunteers. Several handheld devices recently were provided to SF by one of its major commercial suppliers, Blue Troll, Inc. The devices eliminated the need to manually type in each code and further reduced inventory errors and spoilage of products that were awaiting entry.

As SF has increased its total pounds of food distributed each year (Figure 7.1-1), it has had to ensure that its inventory has had effective "turns" (i.e., the number of times in a year that its inventory is turned over or distributed) (Figure 7.5-8), as well as adequate inventory days-on-hand (Figure 7.5-9). Monitoring these measures helps SF to meet any unanticipated events, such as a weather disaster, that could occur in its service area. With the help of the RICE system, SF's Agency and Industry Relations Manager was able to work with several V-teams and PITs to identify and implement several key improvement opportunities in these areas. Currently, for the inventory turns measure (Figure 7.5-8), SF is approaching the best in the FBLC.

As part of the monitoring and improving of SF's inventory days-on-hand and as part of its strategic objectives, SF focuses on meeting the seasonal food demands of its communities and measures the percentage of times that its supply and distribution have equaled the demand (as measured by member agencies) (Figure 7.5-10). Examples of these demands include providing fresh vegetables in season and specialty items for religious holidays. In addition, there are more demands in the summer to feed children who will not receive free or low-cost school meals, and there are increased demands following a regional or local market or weather event (e.g., layoffs, seasonal workers, tornados). To meet these demands, SF has increased its partnerships and collaborations with suppliers (e.g., with the Des Couers County Home Extension Master Gardener Program) and food donors (e.g., encouraging them to supply food that meets the demand). SF is known regionally for these partnerships and was best in the FBLC in 2006 for this measure. In 2007 SF projects that it will be approaching the national FBA best food bank for its ability to meet the seasonal demands of its communities.

Once food products are inventoried, it is essential to SF that minimal spoilage and waste occur. Labeling errors, as well as where products are placed within the warehouse, can increase potential spoilage and delay the effective distribution of products (Figure 7.5-11). V-teams and PITs have come together to work on this issue, and since 2004 SF has made significant improvements.

As SF's inventory management has improved, so has the distribution of food products. Each member agency that SF serves submits a monthly request form detailing the food products required. Based on all requests submitted by the 58 member agencies, SF must determine its ability to meet agency needs and the timetable of product distribution based on current and projected inventory. Two key measures for distribution effectiveness are (1) SF's ability to deliver the requested products and volumes of product for each member agency (i.e., "fill rate") (Figure 7.1-4) and (2) product allocation effectiveness (i.e., the proportion of food received by SF that is distributed in accordance to member agency needs) and satisfaction rating (Figure 7.5-12). SF uses a
five-point Likert scale (5 = very satisfied, 4 = satisfied, 3 = neutral, 2 = dissatisfied, and 1 = very dissatisfied) for these measures.

SF is highly dependent on effective partnerships with key suppliers, and it measures how these partnerships translate into SF’s ability to effectively meet the inventory requirements of its member agencies. The effectiveness of these partnerships is primarily monitored through the Inventory and Resource Effectiveness (IRE) Index (Figure 7.5-13). Measuring the food received from its suppliers, SF bases the IRE Index on four key factors: volume, selection, perishability, and packaging. A score of 10 on the index would mean that all four factors were met perfectly; however, sometimes suppliers provide a high volume of food but other factors, such as selection, might be low. This is an internal index with no available comparatives. Another measure for the effectiveness of partnerships is the percentage of products from key suppliers utilized, as well as the reengagement of suppliers (Figure 7.5-14).

The satisfaction of suppliers, which is ascertained through the gathering of information and data from surveys, meetings, personal contact, and Assistance Now Finder (see Figure 3.1-1), is shown in Figures 7.5-15 and 7.5-16. SF uses a five-point Likert scale (5 = very satisfied, 4 = satisfied, 3 = neutral, 2 = dissatisfied, and 1 = very dissatisfied) to measure suppliers’ satisfaction. Since 2005, for the satisfaction of suppliers/donors of services, SF has been the best in the state, per IFBA data. It projects that in 2007 it will again be the best in the IFBA for this measure, as well as the best in the state for the satisfaction of suppliers/donors of food.

As part of a regional disaster relief effort, SF participates in quarterly mock disaster drills coordinated by local and regional police, fire, and emergency medical service (EMS) agencies in its communities. After each drill, these agencies evaluate participants’ response effectiveness across the region (Figure 7.5-17). In 2006 SF had the best response effectiveness in the FBLC.
In 2005 SF introduced a supplier recognition program to highlight the contributions that different suppliers have provided. Based on quarterly donations as determined by volume, type, and condition of donations (food, finances, and services), a ranking of contributing suppliers is completed by the Development Director and members of the Friend-Raising Committee, and suppliers are presented with quarterly certificates (Figure 7.5-18). SF’s supplier recognition program was recently recognized as a “Best Practice in Iowa” by the IFBA.

7.5a(2) SF’s support process (key work process) Resource Management and Administration (see Figure 6.1-2c) consists of three major areas: staff and volunteer management (see Item 7.4), financial management (see Figures 7.3-1, 7.3-2, and 7.3-3), and fund development (see Figures 7.2-9, 7.2-10, 7.3-11, 7.6-3, 7.6-7, and 7.6-9).

SF considers the effective maintenance, uptime (i.e., things operate as intended when intended), and upkeep of three key areas—the RICE system, its fleet (two trucks and a van), and maintenance (refrigeration units and grounds)—critical to daily operations (see Figures 7.5-19, 7.5-20, and 7.5-21). Figure 7.5-20 shows the Fleet Maintenance Index that SF created to track the maintenance needed on its vehicles. The index is calculated from hours of unscheduled downtime for the trucks and van, maintenance and repair time, and cost, with ten equaling no downtime (i.e., the ideal situation) and one indicating the vehicle is not usable.

Similarly, the Grounds Maintenance Index (Figure 7.5-21) uses a ten-point scale, with ten meaning perfect conditions throughout the grounds and one equaling the worst conditions possible. Both indices reflect performance against a standard with multiple
criteria for performance. Through the effective use of checklists, logs, training, audits, and documented operating procedures, the maintenance, uptime, and upkeep of these key areas have continuously improved. It is anticipated that in FY2007, each of these maintenance measures will be near ten on the index, with no failures and no downtime.

Based on weekly and monthly deliveries to SF’s 58 member agencies, as well as daily pickups from suppliers and other collections, SF’s vehicles each average more than 50,000 miles a year. SF’s “Drive the Limit” efforts, which have been underway since 2003, have focused on ways to get all trained and licensed employee and volunteer drivers to obey the speed limits throughout SF’s service area. In 2005 incentives were provided to drivers who retained clean records; the percentage of drivers with clean records is shown in Figure 7.5-22. Records and safe-driving compliance are monitored through the Iowa Department of Transportation and “How’s My Driving?” stickers, which have been placed on the back of all SF vehicles. The stickers encourage the public to report unsafe driving directly to SF. These reports are incorporated into SF’s driver records.

In 2005 the 30-foot refrigerator tractor/trailer was replaced, and, with the replacement of the van in 2006, this significantly improved overall gas mileage (Figure 7.5-23). From FY2005 to FY2006, SF has been able to keep its expenditures on the fleet relatively stable even though gas prices have risen substantially.

7.6 Leadership Outcomes

7.6a(1) Key measures for accomplishment of organizational strategy and short-term action plans (see Figure 2.2-2) are shown in Figure 7.6-1. SF monitors progress through a “stop light” system. Green (G) signifies that SF is currently within 5 percent of goals, yellow (Y) indicates that progress is 5–10 percent below goals, and red (R) indicates progress below 10 percent. Goals are part of the action plans and typically include completion dates and cycle time improvements.
SF’s significant accomplishments from 1997 to 2005 are another measure of strategy achievement. Figure 7.6-2 is a brief summary of some of the highlights that have resulted directly from SF’s Strategic Plan.

7.6a(2) One measure of stakeholder trust is the amount and increase of donations and other monetary support (see Figure 7.3-9). When donors trust that SF is a good steward of their contributions and is effectively and efficiently reducing hunger, they are willing to increase their donations. Figure 7.6-3 shows annual increases in funding from SF’s top 10 percent of donors (special or major gift donors, capital donors, or planned gift donors [see Figure 3.2-1]).

Ethical behavior is monitored by tracking the number of possible ethical breaches, and calls to the hotline are a key measure of ethical conduct by board members, employees, and volunteers (Figure 7.6-4). The peak in the number of calls in 2004 occurred after the toll-free 800 number became available. SF’s new volunteer orientation now emphasizes ethical conduct, and hotline calls have decreased since 2004.

All employees and volunteers are asked to complete an annual self-assessment on SF’s values and ethical behavior. Due to scheduling gaps and the infrequency of some volunteers’ service, that goal has not yet been achieved (Figure 7.6-5).

Another measure of ethical conduct is SF’s approach to meeting legal and regulatory requirements and standards and compliance

Figure 7.6-2 Significant Accomplishments

<table>
<thead>
<tr>
<th>Year</th>
<th>Accomplishment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997</td>
<td>Strategic planning initiated, new refrigeration units added</td>
</tr>
<tr>
<td>1998</td>
<td>New volunteer recruitment process instituted, first local area network (LAN) for information sharing deployed, Share Food for Thought newsletter launched, formal training and implementation of PDCA completed</td>
</tr>
<tr>
<td>1999</td>
<td>First partnership with DU students, Friend-Raising Committee created, SF’s Balanced Plate Scorecard developed</td>
</tr>
<tr>
<td>2000</td>
<td>Baldrige framework introduced, volunteer orientation begun, ethics training for all employees/volunteers mandated, Training and Volunteer Tracker database created</td>
</tr>
<tr>
<td>2001</td>
<td>First state quality award application submitted, Corporate Contributor Program established, regional mock disaster drills begun</td>
</tr>
<tr>
<td>2002</td>
<td>SF food pantries and soup kitchens shut down (with services outsourced to member agencies) to focus on food banking, pilot program with Des Moines County court system begun, LDP pilot implemented</td>
</tr>
<tr>
<td>2003</td>
<td>Values deployed to all employees/volunteers, succession plan developed, customer survey becomes available in Spanish and Hmong, joined FEED Iowa Partnership</td>
</tr>
<tr>
<td>2004</td>
<td>Employee and volunteer survey implemented, toll-free 800 number added to the ethics hotline, FoodAnswers awarded by FBA, Cross-Training and Job Rotation Programs instituted</td>
</tr>
<tr>
<td>2005</td>
<td>Pallet recycling begun, implementation of RICE, recipient of state quality award</td>
</tr>
</tbody>
</table>
measures (see Figure P.1-3). Senior leaders have delivered a consistent message to all employees and volunteers that SF will strive to exceed all known standards, and it will seek to identify system failures and improvements. Some compliance results are presented in Figure 7.6-6. Other compliance results are presented in Figures 7.4-14 and 7.4-15.

Stakeholder trust depends on SF’s relationships with member agencies, financial donors, and the communities served. All employees and board members sign conflict-of-interest statements each year, and nearly all key volunteers also sign statements to maintain stakeholders’ trust.

SF’s ability to attract grants is further evidence of stakeholder trust, and the organization has increased both the number and amount of grants received (Figure 7.6-7). In 2005 SF received two grants directly and two through a collaboration with member agencies. In 2006 SF received three direct grants and one for a collaborative effort.

Figure 7.6-7 Increasing Number of Grants and Funding

<table>
<thead>
<tr>
<th>Year</th>
<th># Grants</th>
<th>Value of Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>3</td>
<td>$17,000 (aggregate)</td>
</tr>
<tr>
<td>2005</td>
<td>4</td>
<td>$28,000 (aggregate)</td>
</tr>
<tr>
<td>2006</td>
<td>4</td>
<td>$32,000 (aggregate)</td>
</tr>
</tbody>
</table>

Figure 7.6-8 Performance to Budget

<table>
<thead>
<tr>
<th>Year</th>
<th>Budget (Millions)</th>
<th>Performance</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>$6.55</td>
<td>$6.53</td>
<td>99.69%</td>
</tr>
<tr>
<td>2005</td>
<td>$6.59</td>
<td>$6.58</td>
<td>99.84%</td>
</tr>
<tr>
<td>2006</td>
<td>$6.64</td>
<td>$6.63</td>
<td>99.85%</td>
</tr>
</tbody>
</table>

Figure 7.6-9 Corporate Contributors’ Donations to Share Food

<table>
<thead>
<tr>
<th>Year</th>
<th>Donations from Corporate Contributors</th>
<th>Overhead (funded by Corporate Contributor Program)</th>
<th>Assistance Now Finder Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>$491,255</td>
<td>11.75%</td>
<td>0.9</td>
</tr>
<tr>
<td>2005</td>
<td>$494,254</td>
<td>11.5%</td>
<td>0.8</td>
</tr>
<tr>
<td>2006</td>
<td>$484,720</td>
<td>12.1%</td>
<td>1.1</td>
</tr>
</tbody>
</table>

Stakeholder trust depends on SF’s relationships with member agencies, financial donors, and the communities served. All employees and board members sign conflict-of-interest statements each year, and nearly all key volunteers also sign statements to maintain stakeholders’ trust.

SF’s ability to attract grants is further evidence of stakeholder trust, and the organization has increased both the number and amount of grants received (Figure 7.6-7). In 2005 SF received two grants directly and two through a collaboration with member agencies. In 2006 SF received three direct grants and one for a collaborative effort.

7.6a(3) Figure 7.6-8 reflects performance to budget, a key measure of fiscal accountability. SF operates within very tight margins to accomplish its mission. Its 99.85 percent performance in 2006 compares favorably to the federal government average of 98.62 percent.

Thanks to the Corporate Contributor Program, SF has been able to fund operations while increasing food volumes. SF’s commitment to its corporate contributors is to exercise prudent fiscal accountability by reducing overhead costs through efficiency (by reducing overhead costs, more of SF’s financial resources can be used to feed the hungry). Although no financial benchmarks for corporate contributors are available, SF has learned that only 8 percent of all nonprofit organizations have similar programs. SF compares its overhead to Assistance Now Finder, which monitors the overhead costs of all participating nonprofit agencies as part of an overall rating system. The Assistance Now Finder benchmark provided in Figure 7.6-9 is for individual food banks; the lower the number, the better the rating. Best-in-class for this measure would be a rating of 0.

7.6a(4) Key results for regulatory/legal compliance are reflected in SF’s adherence to the laws and regulations that govern food bank operations. Figure 7.6-6 reflects SF’s most recent status with key regulatory agencies. In addition, SF voluntarily adheres to the accountability standards set forth by the Iowa Council of Nonprofits and the Iowa Charities Review.

SF’s approach to audits is “the harder, the better.” SF designed its independent audits (see Figure 1.2-1) to be extremely demanding. Figures 7.6-10 and 7.6-11 show SF’s internal audit findings; Figure 7.6-12 shows external findings.

The internal audit program (Figure 7.6-10), which is the responsibility of the Program Director/CFO, has uncovered many opportunities for improvement. In 2004 there were only two findings (most serious category), but they were significant enough to become strategic objectives the following year. Through action
planning and performance review, checks and balances were put in place to prevent their reoccurrence. In 2006 the increase in discrepancies was due to more rigorous auditing, which ultimately reduced external audit findings. SF’s volunteer auditor reports all results (Figure 7.6-11) directly to the Executive Director for appropriate attention and action. Results of all external audits (Figure 7.6-12) demonstrate that SF’s internal audits are doing just what they were designed to do: identify and correct weaknesses.

7.6a(5) SF’s senior leaders, employees, board members, and volunteers actively support their communities by donating time to community outreach programs (see Figure 1.2-2). Actual hours donated are not yet formally tracked by SF, but participation in terms of hours and scope of activities has increased over the past five years. SF participates in a workplace campaign for the Ways of Connection, and it is proud of the generosity of its employees (Figure 7.6-13). Guest speakers from Ways of Connection agencies make presentations to employees and volunteers on a range of unmet community needs. This broadening of awareness of the full spectrum of community needs has directly led to increased contributions by employees. Note: In 2003 employees were downsized from 12 to 10.5 FTEs, so 10.5 FTEs in 2006 is 100 percent participation.

One area of SF’s environmental focus is recycling (Figure 7.6-14). SF has had a paper recycling program in place for many years. In 2005, as the result of a strategic objective, wooden pallets were included in the recycling effort, and a sharp drop in packaging waste occurred (see Figure 7.5-6). This effort has been highly successful and has supported a fledgling pallet-supply business that hires handicapped adults. SF’s senior leaders and board members believe that recycling is the right thing to do, and SF’s employees and volunteers are earnest about fulfilling all community responsibilities. More detailed information about SF’s food product and packaging waste is shown in Figures 7.5-5 and 7.5-6.

SF’s vision is a hunger-free Iowa, but only so much progress can be made by providing food. In 2003, building on a successful urban grocery store in Bountiful County, SF joined the FEED Iowa Partnership to encourage local communities in its six-county area to use food-based businesses as drivers for sustainable economic growth. As part of the partnership, SF works with its member agencies and their local economic development officials to pursue development projects to fill unmet retail food demand. In cooperation with the DU School of Business, development opportunities are identified, and SF presents the business case to the local community. SF was one of the first food banks in Iowa to join the partnership, and its 2006 support for development proposals was the highest in the IFBA (Figure 7.6-15).
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