A Guide to Creating a Community Service Center



Neighbors Helping Neighbors PAWLING RESOURCE CENTER

Based on the Creation, History, and Experiences of the

Pawling Resource Center

Ву

The Pawling Resource Center Board of Directors And the Executive Director

Telling Our Story

"At the end of the day it's not about what you have or even what you've accomplished...it's about who you've lifted up...who you've made better. It's about what you've given back." - Denzel Washington, actor, director, and producer

Strong communities owe their success to many factors; excellent governance; a growing economy spurred on by a business community that meets the needs of its citizens; recreational and cultural resources; progressive schools committed to educating its children; opportunities to fully engage in the religious practice of one's choosing; a local library; and a willing cadre of community volunteers. However, within this universal structure called community, there are many who don't thrive. These are the neighbors in need. Perhaps they are having difficulty making ends meet and require access to a source for healthy food choices, or are recovering from a health issue, or need transportation to a doctor or a ride to the grocery store. Perhaps their children need warm clothing, a new backpack filled with school supplies, or a wrapped Christmas present.

Strong communities are caring communities, where neighbors help neighbors by offering a helping hand to those who have fallen on hard times. Pawling, New York is such a community. This is the story about how ordinary citizens discovered the needs within their community and found ways to fill them.

Located in the southern most corner of Dutchess County, New York, the Pawling Resource Center serves the town of Pawling's and the Hamlet of Holmes' 8,463 residents. In Pawling and Holmes there are 1,746 seniors. 4.7% of the population in Pawling are living below the poverty line, and 29% of Pawling residents are considered of moderate income. These figures are based on the 2010 Census, however, there has been an appreciable increase in the immigrant and elderly populations since then. Many of these residents are economically disadvantaged and rely on the Pawling Resource Center's programs.

Over the last forty-three years, The Pawling Resource Center was established, developed, and nurtured by an active Board of Directors, competent and enthusiastic Executive Directors, a part-time staff of two, and an army of volunteers that provide a safety net to everyone who lives, works, or attends school or religious services within its borders. It has succeeded in its mission of helping local families who are struggling to survive challenging circumstances that often come with aging, loss of independence, health setbacks or job loss.

Today, the Center has several firmly established programs that operate throughout the year, as well as several seasonal programs that benefit families during the holidays of Thanksgiving, Christmas and Easter.

First and foremost is our **Food Pantry**, which serviced 242 households (comprising 723 individuals) in 2019. Clients visited us 1,903 times that year, and of those served, 45% were adults, 39% children, and 16% seniors. The Center's **Transportation Program** provided 787 rides to medical appointments and 816 one-way trips to access food. Additionally, over 600 items of **Medical Equipment** were accessed by those that needed them, including hospital beds that provided comfort to those whose medical needs were more urgent. Along with the major services mentioned above we offer **Compassionate Services**: seasonal services, which include providing backpacks filled with grade-specific supplies for children who would otherwise not be able to afford them; *Adopt a Family*, which provides holiday gifts of clothing and

small toys along with supermarket gift cards to needy children and their families at Christmas; Senior holiday and "sunshine" gift baskets; and special distributions of food for holiday meals to client families during Thanksgiving, Christmas and Easter. The Center also makes referrals to County social services and offers copying services to not-for-profit organizations in town. Copying Services, while not strategic per se, are a hold-over from one of the original services offered when the Center was conceived and thus something retained so long as the need remains.

Most recently, the Pawling Resource Center has received inquiries from several neighboring communities in which we were asked for information that would help them in forming a similar center within their own communities. It is clear that the process of creating a meaningful community service isn't simple or easy, but with commitment and hard work, it is certainly possible. With over four decades of experience in building just such an organization, we are pleased to share our journey, along with a road map to guide you in your pursuit of offering humanitarian services to your most vulnerable citizens. On these pages you will find the information you will need to set up a non-profit organization in your own caring community. We have also included a brief history of the Pawling Resource Center, an organization that has evolved throughout the years to meet growing needs.

Keeping in mind that our journey is unique to our community and no two paths will be the same, we think the model that we have developed is universal in its ability to guide you on a path that has been emboldened by your desire to help others. We hope that you will be able to look back with pride on the positive impact your many efforts have had on your neighbors in need. We also hope that you will find this manual informative and easy to use. Let us hear from you. Send us an email at info@pawlingresourcecenter.org and tell us about your journey.

From our neighbors to yours... Thank you for what you are doing!

Wishing you great success,

The Board of Directors, Pawling Resource Center

Rev. Mark Alla	n Rev. Stefan Gramenz
Elizabeth Aller	n Tricia Lamorte
John Brockway	Anna Lindstrom
Halliday Clark	Dorlaine McLaughlin-Judy
Charlie Daniels	Pastor Parker Prout
Amy Farrell	Susan Smith
Ann Godesky	Susan Stone

Executive Director

Terry Ariano

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The Pawling Resource Center...Then and Now

"Reaching the top of a high mountain is just a personal victory. But for a victory to be important for the society, it has to be useful for the humanity!" - **Mehmet Murat ildan, Turkish Novelist, playwright and thinker**

The Pawling Resource Center began as the Community Resources and Service Center (CRSC), founded in July of 1976 by community members John Brown and Reverend Ralph Lankler. Its initial mission was to create a local place for service agencies in the county seat of Poughkeepsie, New York (located 23 miles away), to meet with community members, and for local groups to hold meetings, and have office space. It offered local churches the opportunity to coordinate efforts of copying and provided secretarial assistance. In the early years the Center explored a range of services, from offering rehabilitation services to the developmentally disabled, to supporting the Red Cross Blood Mobile, eventually finding the most effective ways to serve the community with its current signature programs.

The Pawling Town Board and Supervisor George Cunningham arranged for a space for the Center in the basement of the Pawling Town Hall. Reverend Lankler organized the Center, enlisted church support, and obtained financing from the West Mountain Mission Fund, a local grantor. This grant represented 67% of the first-year's expenses which included rent, utilities, insurance, office supplies, miscellaneous fees, programming expenses, and some basic equipment needed to run a small business consistent with its mission. Local businesses donated additional office equipment and copying machines, as well as woodworking tools, which were used to offer wood craft classes. Yoga classes were also offered.

Within the first year, the Center conducted a health clinic with the services of a volunteer public health nurse and partnered with the Dutchess County Office for the Aging, Salvation Army, Meals on Wheels and local churches. The Center provided counseling services, Social Security advice, had a volunteer motor corps, and a telephone check-in for seniors, among other services. In the ensuing years, the organizers continued to refine programs to facilitate serving the community in the most needed areas. As with many organizations of this type, needed community services evolved, as did the services that were provided by the Center.

In the beginning, the Center's founders took on all the organizational responsibility. Mr. Brown acted as the first volunteer Executive Director, and Rev. Lankler served as the first Board Chairman. Over time, the network of support grew, and the leadership team's focus expanded. Subsequent volunteer directors ran programs, recruited additional board members which consisted of the pastors and two laypersons from each Christian parish in Pawling, managed the growing volunteer base, aggressively promoted the Center, and compassionately ran the organization.

By 2010, the organization changed its focus and expanded the board to include representation from all local churches and a number of local business leaders. All board members are extremely active in governance and fundraising. All donate their time and expertise in the areas needed to enable the Center's mission including but, of course, not limited to finance, marketing, special events, programming, technology and grant writing.

Today, the Center's revenue has grown to \$135,218, raised though a bi-annual community appeal, an annual fundraiser, grants, and corporate support. Expenditures in 2019 totaled \$141,406.

Volunteers are clearly the heart and soul of the organization. They answer phones, stock shelves, assist food pantry clients, help people with requests for medical equipment, tally and track the many statistics which need reporting, and transport clients to medical appointments, grocery shopping, or to shop at the food pantry. In 2019, 2,205 volunteer office/pantry hours were logged by 45 volunteers, with an additional 2,579 estimated hours logged by 40 volunteer drivers providing ride services.

The PRC now employs an Executive Director and two part-time staff and one part-time seasonal employee. The Center is funded by individual and corporate donations, grants from regional and County funders and in-kind donations.

Community support of and involvement in the Resource Center is strong. Through in-kind donations from local businesses of goods and services, such as pest control, plumbing repair, tech support and grounds maintenance, as well as numerous volunteer hours, our operational expenses are kept relatively low in proportion to the services provided. Our 3,000 square foot, 2 floor operating space, housed in the Carriage House of the historic John Kane house, is rented to the PRC for \$1.00/year by the Historical Society of Quaker Hill and Pawling. It is this kind of arrangement that allows us to funnel more of our resources into programming. Because of the generosity of local organizations and businesses, the PRC is well positioned to provide needed services long term. With the limited historic significance of the Carriage House, modifications were allowed to be made to the building in order to accommodate our Food Pantry, medical equipment storage, all office and administration space, as well as provide areas to house supplies for our seasonal programs which include holiday gifts, coats, backpacks, etc. Additionally, it offers limited space that allows privacy to our clients who require social service referrals.

The Center is open six days a week. Donations of food, medical equipment, winter outerwear and various other items are immediately shelved or distributed to families. In 2019, 3,421 bags of food and personal care items and 400 boxes of holiday food items were donated to the Center by residents and distributed to our clients. Almost 100,000 pounds of food was donated by local grocery stores, food drives and local food pantries. The PRC was able to purchase nearly 25,000 lbs. of food from the Regional Food Bank. Eighty-one backpacks filled with school supplies were distributed to children. Further, the 2019 holiday Adopt-a-Family program organized local community members to purchase gifts for 88 families, with more than 200 gifts added by the PRC.

This generosity of volunteer time, donations and community support, including in-kind donations which offset operating expense, has made it possible for the PRC to continue to operate since its inception more than 40 years ago. As a quiet presence in the town, the Pawling Resource Center contributes immeasurably to the fabric and quality of community life in Pawling. But don't take our word for this... consider what others are saying:

 "The Pawling Resource Center is a shining example of how volunteerism can effect immense positive change in a community. Not everyone is lucky enough to have family and loved ones who can assist them, and the Pawling Resource Center has been stepping in to support many in our Pawling community for a very long time. They are an invaluable asset to our community, I applaud their hard work and dedication, and I look forward to supporting them for many years to come." – James Schmitt, Pawling Town Supervisor • "Over the last eight years, I have had the pleasure serving on the Pawling School and Rotary Boards. During that time, the PRC has been the recipient of our organization's donations of good and services. It has been a pleasure working with the PRC knowing how effective they are in reaching those in need locally and distributing our donations in the most efficient way. They know well their clientele's needs and make every effort to meet them. Pawling would not be the giving community it is without the presence of the PRC." - Jeff Asher, Pawling School Board Member, Pawling Rotary Club Secretary.

Where to begin?

"If you have a dream, you can spend a lifetime studying, planning, and getting ready for it. What you should be doing is getting started." - Drew Houston, CEO & Founder, Dropbox

If you have an idea for a community resource and don't know how to get started, consider this: You already have! What comes after your initial idea for "doing good" is nothing more than thinking your way to the next step...and the one after that. This manual is the place where you can find many of the answers to the question, "What do I do now?"

All new businesses, whether profit-making or not-for-profit service organizations pretty much follow the same road map...with one exception. Not-for-profits need to apply and receive their 501(c)3 status in order operate as a non-profit making organization. It's important to make this your first priority, because without this designation, you will forgo many Important tax advantages and your donors will not be able to deduct their contributions from their individual tax returns, which results in a savings to them and encourages giving. This designation also encourages planned giving made through IRA mandatory distributions by those who are required to take distributions after age 70 ½.

Naming your organization

In order to apply for your 501(c)3, you need to decide on a name

What's in a name? A lot!

You will be identified by what you choose as your name for a long time – perhaps as long as your organization exists. Your name should make It easy for clients and donors to identify what you do. For example:

The Pawling Resource Center...The name makes it easy to tell this is for the community of Pawling and it provides resources for community members. There is nothing fancy or clever about this name. It is simple and is an identifier.

There are company names, however, that tell you nothing about what the company does...For example:

B&J Enterprises. Possibly founded by Bob and Jane, hard to say... might have been involved in providing resources... hard to say. Successful – hard to say!

Exercise: Make a list of 5 names that would make it easy to identify who you are and what you do. Then make a list of 5 names that would totally confuse even the smartest among you! Then...pick a name...and move to the next step!!

Viable Names	What does this name tell you?

Not so viable Names	Why isn't this name helpful?

Your organization's Name: ______

Why you chose this name:

Forming a Board

Forming a board before incorporating is generally a good idea. Some states require that you list the names of your board members in your incorporation documents. Even if your state doesn't require this, <u>recruiting a board</u> prior to incorporating is helpful.

Discussions with local leaders and an online search (The Balance/Small Business <u>https://www.thebalancesmb.com/</u>) about board formation yielded the following information that will be helpful in your own search for leadership.

Many new human service nonprofits are started by an individual(s) who have a passion and a skill set to fill a need in a community. Clearly defining the role of the founder(s) early on with the newly created board is crucial for the long-term success of the organization Additionally, determining early on if the newly created board will be "advisory" or "working" will help determine the candidate profile and define the expectations and commitments of board members.

It's always a good idea to get good, knowledgeable people to help you get started and run your "venture". You will need to select a board. Your board members will help you make decisions and also satisfy the requirements of the state in which you are incorporating. Here are some things to think about before you select board members.

How many board members should there be?

First, select an uneven number of board members, to avoid ties. The number of board members depends on the size and complexity of the organization. For a small organization, five to seven people are plenty. For a larger, more complex, organization with several committees, you might want 9 to 11 people at the minimum.

You need enough people on your board so that, if several people are not present, you can still have enough to make decisions, and for a quorum. But too many board members can slow down any meetings and progress.

What does a good board member look like?

When you are recruiting board members, look for these characteristics:

• Expertise in a specific area which can help your corporation. For example, many corporations include an attorney and a financial on their boards.

*Small community-based non-profits often seek and attract clergy to their boards. This was instrumental for the PRC in the early years and is a tradition that continues today. It should be noted that some grant funders require board diversity and at times shy away from organizations with strong religious ties.

• Leadership and management experience, especially in related businesses. For example, if your venture is in a technical area like computers, you should have people who do business in that area. They know others who can help you, and they understand the specifics of the management and operation of the business.

- Commitment to the organization. Board members must be interested in the organization and its continued well-being. (They should not be serving just for enrichment in any way including personal self-interest).
- Time and energy to devote to board duties. Board members will be expected to spend time
 preparing for and attending board meetings and to serve on additional committees. It should also be
 noted that in the early years, prior to being able to hire an Executive Director, the board members
 will be intimately involved in the day-to-day management of and decision making for all operations.
 Establishing committees in the bylaws will ensure the board will be effective and draws the line
 between board and executive director roles. Suggested committees are Governance (made up of
 the officers and other committee chairs), External Relations/Fund Raising, Oversight (finance/audit,
 physical plant), and Program/Planning.
- The board will be responsible for oversight of the Executive Director, once one is brought on board. Special care will need to be taken to make sure that the Executive Director is meeting expectation. An annual review should be part of this oversight, and complacency should be avoided when determining if changes in this position need consideration.
- Integrity and lack of a conflict of interest. Board members will need to sign a conflict of interest statement, and they must act in the best interest of the business, not their individual or business interests. For example, a board member who profits from his or her service on a board of directors may put the entire company in jeopardy. Conversely, the conflict of interest recommendations may require some tweaking. Nearly all boards have very effective members who have some conflict of interest. Adopting policies that require transparency will ensure an organization is compliant with New York's Non-Profit Revitalization Act and will also ensure the organization is not excluding otherwise valuable board members.
- Ability to raise money for the corporation. Your organization can have a significant advantage if you select one or more board members who have experience raising capital for business startup or expansion.
- Diversity and representation of community make-up

Who not to select for your Board of Directors

- Don't select someone just because they are a friend or relative.
- Don't select someone who hasn't been checked out thoroughly. Do a background check, get references.
- Don't select anyone who has a conflict of interest or potential conflict of interest.

Of course, each type of small business needs specific kinds of people to serve on its board of directors. But all businesses need individuals with integrity, commitment, and interest as board members.

However, just because you follow all the steps in setting up the perfect board with just the right mix of professionals who are community active, doesn't always mean that you will have smooth sailing. Board members will disagree with goals, mission, and vision, especially as your Resource Center expands and adjusts to changing community needs. This is why it is so important to develop your mission and vision, and to review it periodically. When board members disagree, focus on your mission and vision, and it will help to right your ship. It is always wise to focus on positive confirmation about sensitive issues when confronting a board member or two...or three who have mutiny on their mind. Although a board's focus should always be on the best practices in governance, it is not always possible to keep things from getting personal...so focus...**Mission, Vision, Goals**!

Write up bylaws

- The bylaws contain the operating rules and provide a framework for your management procedures. They are the tools of internal accountability and they outline the inner workings of your nonprofit.
- The power to adopt, amend or repeal bylaws is vested in the board of directors. This is unless otherwise provided in the articles of incorporation or in the bylaws.
- Bylaws contain the rules and procedures for things like holding meetings, electing directors, appointing officers, and taking care of other formalities.

*Note: An organization that is exempt from federal income tax, as described in Internal Revenue Code 501(c)(3), is required to report changes to its bylaws and other governing documents annually to the IRS on the organization's IRS Form 990 – which is part of ensuring ongoing compliance.

Prepare and file your incorporation paperwork

- Having chosen a name for your nonprofit and appointed a board of directors, completing and filing your incorporation paperwork should be simple.
- Within your incorporation paperwork, you will be officially declaring your organization's name, location, purpose, the initial board of directors and more.
- You must file "articles of incorporation" with your state's corporate filing office. Experts recommend that you incorporate in the state where you will conduct your nonprofit's programs or services.
- If you want to incorporate in another state, you would need to register and apply for separate tax exemptions in each state in which you conduct activities.
- Filings and fees will vary by state. Incorporating your nonprofit does not make it 501(c)(3) exempt. The IRS requires you to include specific language in your articles of incorporation for those intending to apply for federal tax-exempt status.
- After completing your paperwork, you will be ready to send it to your state filing office (in most cases, this is your Secretary of State). The requirements will vary from state to state. Some may want you to submit your articles electronically, others may ask for multiple copies to be sent via mail, etc. After filing your articles, many states also require you to publish a notice of incorporation with your local newspaper.

*Note: Obtain a federal employer identification number (EIN) prior to applying for 501(c)(3) tax exemption, even if you don't have employees. You can do this quickly and easily. For information on how to apply for an EIN, including information about applying online, visit the IRS website at <u>www.irs.gov</u>.

File for 501(c)(3) tax-exempt status

• You apply for exempt status with the <u>Internal Revenue Service (IRS)</u> for recognition of tax exemption by filing IRS Form 1023. To get the most out of your tax-exempt status, file your Form 1023 within 27 months of the date you file your nonprofit articles of incorporation.

- Be aware, the <u>user fee</u> will be \$275 or \$600, depending on your application method. It also can take 3-12 months for the IRS to return its decision, depending on how many questions the IRS has about your application. That's why many experts advise starting with this process as soon as possible.
- Form 1023 itself is up to 28 pages long. Including the required attachments and other supporting documents, an application package can be more than 50 pages long.
- The 501(c)(3) application process is a thorough examination of your nonprofit's governing structure, purpose and planned programs. The IRS is looking to make sure that the organization is formed for exclusively 501(c)(3) purposes and that its programs are designed to fulfill these stated purposes. In addition, the IRS is looking closely for conflicts-of-interest and the potential for benefit to insiders, both possible grounds for denial.

Ensure ongoing compliance

- The work doesn't stop there. Once the state approves everything, you should prepare for annual reporting requirements.
- In most cases, an exempt organization must file some version of <u>Form 990</u> with the IRS, depending on its financial activity. Form 990 shows your finances, activities, governance processes, directors, and key staff, and it is open to public inspection.
- States have their own reporting and renewal requirements too. Therefore, consider tracking your organization's finances and activities throughout the year. This will help the reporting happen smoothly.

Vision and Mission statement

You remember the old adage: "do as I say, not as I do". Well, there is no question that if someone had prepped a "how to" handbook for our founders to follow, a lot of unfocused, try and try again time and trouble might have been avoided. We will never know if this more focused approach would have been beneficial to our eventual success. But, just in case it would have been, we are including some helpful information below. We hope it will save you a lot of valuable time. If, however, after careful consideration of the points presented below, you feel that trying out many ideas that might positively impact your community, without knowing which of the many will work, would be the way to go, then, by all means do so. Sometimes you can hit on a real gem of an idea that truly resonates with information your community needs.

There are some salient points to consider, nevertheless, when confronting the choices that will need to be made at the beginning of this endeavor. Whether pursuing the focused approach to business building or the more organic route, the following points will need to be taken under advisement.

- 1. Confronting your community's need in an organic, "let's try this out and see if this works," approach <u>will</u> probably eat up a lot of valuable time and resources, and <u>will</u>, most likely, add years to realizing your goals.
- 2. Reviewing your vision and mission periodically and being willing to make changes to it, that better resonate with where you think you are heading as community needs change, will provide a framework on which to build upon your successes.

3. None of this is easy!!

Without a clear problem statement, your efforts will lack focus

What is the vision for your organization? What is your aspirational goal? We recommend that you start small and keep it simple. Determining this can be challenging, as it is grasping at an elusive concept that penetrates the hearts and minds of all who know about you, need you, or will donate to you.

What problem within your community are you looking to positively impact, and how can you articulate it as clearly as possible with as few words as possible?

Defining Your Vision:

The vision should be bold. Every word in the vision matters – be intentional.

A good vision is not easy to achieve. It would be easy to go out and feed a few people the day before Thanksgiving – but to ELIMINATE hunger – less easy. Use of 'local' means your efforts will not include those outside of the community – however, the use of the word local is also clever in that the definition of local is relative and this fuzzy definition gives you strategic flexibility. The key is to be intentional in each word in your vision. And be prepared – if you say "provide food" get ready to enter a debate that might look like this:

"Should we say fresh food?" "Well, what does that mean for canned goods?" "Shouldn't it be nutritious" "Cooking oil is not nutritious" "What about it tasting good?' "Everyone doesn't like the same thing..."

If you have debated the phrase "provide food" as indicated above – you're off to an excellent start!

Exercise: Creating your vision statement

There are several ways you can go about creating a vision statement. Typically, this starts with simple brainstorming: brainstorm key words that represent what you want to achieve. Are the words inspiring? Can you put them into a sentence that is clear? Can you make it time bound (3 years is often a good target)? Is it *possible* you could achieve this, if you focus and really work on it? If you were to achieve the vision – would you be proud? Now that you have something – go online and look up "sample vision statements". Does this give you any new ideas (don't steal someone else's vision – learn from what others have done). Then – walk away. Put it down for a week and come back to it. Does it still sound as good as the last time you looked at it? Share it with some respected colleagues, ideally a few that do not think just like you. Then, reflect on what they said.

There is no "right" vision statement, but for sure, some inspire action more than others...

Defining Your Mission:

Your mission is the succinct description of how you will achieve your vision.

Once you have your vision, this is the point at which you must clearly define your objective(s) – or your mission. The mission is HOW you will deliver your vision. The mission is action oriented and should be directly aligned to the vision. If your vision is "to eliminate hunger" – your objectives should contain food related actions. If your vision is "to eliminate hunger" and your mission contains "provide clothing," as they say in the business world, you are 'off strategy'. Clothing is important but, if it is not part of your vision and you create an objective around it, it is merely a distraction.

We provide food to families in our community. When written well, your objective will establish boundaries. It will clarify the focus and scope of the work. In the examples below, notice where the focus progressively becomes clearer.

- Initial idea Provide food to families
- Smaller focus Provide food to families *in our community*
- Clearer focus Provide food to families *in need* who live in our community
- Ideal focus Provide *healthy* food to families in need who live in our community
- Purposely expanded focus Provide healthy food to families in need who live in *or worship in* our community

Mission – over time your objectives should stabilize to become a mission. Your mission is the succinct description of how you will achieve your vision.

Exercise: Creating your mission statement

To write your mission, identify the few actions you will prioritize (3-5 is a good target) to deliver your vision. You can literally start by decomposing your vision (select words in the vision that are indicators of what will come in the mission). Write down actions that are specific and help answer what you <u>do</u> <u>not</u> do. Once you have these written down, ask if you could go tell a future board member to lead the planning about each specific action. Then go to the internet and search out other ideas, review with colleagues and...step away and come back to it. Both the vision and mission take time; allow yourself the time to get this right.

Enter your mission statement below:

Start-up Checklist

In addition to your vision and mission, there are several other basic steps to follow in order to begin operation. Here's a check list to get you started!

	S	tatu	S		
Action	Not Started	Started	Complete	Comments	Remaining actions
Find a space out of which to					
function. This can be a basement,					
an extra bedroom, or a donated					
extra office in someone's place of					
business, a local church or					
unused community space.					
Get a phone number and					
designated business phone.					
Get a Post Office Box number if					
you do not have a space that has					
a usable return address.					
Have access to a computer that					
can be used for the organization.					
Have a clear plan for the					
databases you will need, and					
proper backup.					
Get an all-in-one					
 printer/copier/fax.					
Get a desk with at least one file					
drawer for record storage to start					
and be prepared to add					
furnishing and storage as your					
services grow.					
Make sure you have access to					
adequate restrooms and consider					
how this space will expand if your					
client base expands					
Open a bank account with on-line					
access to check writing.					
Invest in paper, pens, and basic					
office supplies.					
Evaluate your immediate storage					
needs and prepare accordingly					

Managing Operations:

"If you can dream it, you can do it." - Walt Disney, entrepreneur, animator, writer, voice actor and film producer

Effective Governance

Much of the information in this section has been discussed throughout this manual in various sections, but it is being succinctly reviewed here, because it is important and is worth another mention.

Vision/Mission Reviews

As your resource center grows, matures, and resonates with your community needs, it will be vitally important that your vision and mission statement is reviewed and updated, in order to reflect this growth. This periodic review by your board will serve to keep the focus where it needs to be; on the community, its needs and the power of your organization to continue with purpose.

Changing Goals

Don't be concerned if you find that a few years into this endeavor the needs within your community have changed. If this does happen, it's time to review your goals. This kind of goal review is a natural outgrowth of passing time, changing demographics, a changing economy or any number of other fluctuations that may occur within a healthy, vibrant community.

Beware of Politics

Within all communities, there are members that are more conservative in their world view, and those that are more liberal. Your organization must always remain neutral in its approach and focus only on community and client need. This is the only way that your survival will be assured and donations from all who are able to give will continue to flow. Additionally, in order to maintain your 501(c)3 designation, all involved in governance must maintain political neutrality. Otherwise, this designation may be revoked.

Insurance Requirements

As you grow, so will your need to insure your organization and your board members against liability. It is best to consult with an insurance professional within your community to assure that appropriate and/or required coverage has been obtained.

Yearly Tax Filings and the Form 990

You will need to engage an accountant or other tax professional who will make sure that government required taxes are properly filed. Someone with the appropriate credentials may be willing to donate these services but, if that is not in the cards, a professional will need to be retained for this purpose. Budget accordingly.

Funding

Money matters when building any business. It is what you need to operate and in the case of a not-forprofit, it is what you need to deliver needed services. At the very beginning, when a few thousand dollars will serve to "get you started," money can be donated by friends, board members or community members who share your vision and mission and wish to contribute. However, as your Resource Center evolves, you will need definitive fundraising operations to maintain income and guarantee services. Fundraising can be done in many ways; a few options for your consideration are described below in more detail.

Annual appeal:

The annual or bi-annual appeal is a letter that will go out to your community in which you will ask for support. There are many ways to write this, and each appeal needs to be different from the last. Having a volunteer or board member on hand with good to excellent writing skills is paramount. There are many ways to approach an appeal letter, and these can be found through an internet search. The most important thing to remember is that it will need to be heartfelt, in order to encourage the community to donate to your cause. If you manage a response rate of 20%, consider your appeal a great success.

Annual fundraising event:

There are many ideas out there for events that will engage your community and provide a forum for additional funding. Fundraisers come in many forms and flavors. A few ideas include a gala, a community fest and barbeque, a walk-a-thon, a craft fair, and ice cream social, to name a few...

Having someone in the organization who is familiar with putting one of these together by forming a committee to organize and run the event will be crucial...these things are always more work than you expect, require marketing, and take up a lot of personal time. Funds can be acquired by securing sponsors for your event and advertising their generosity, selling ads in a journal, having a 50/50 raffle, silent auction or raffling off some great prizes and/or selling tickets to the event. There are, of course, many other creative ways to bring in dollars. As always, the internet is a great source for ideas.

Grant writing:

This is the most difficult of proven ways to raise cash and requires that the grant writer knows how to write to this specific medium, is able to research possible funders, and can gather all the necessary information that each grantor requires. Hiring a professional grant writer should be considered as soon as it is financially possible.

Raising Awareness and Building Community Support

"A brand for a company is like a reputation for a person. You earn reputation by trying to do hard things well." – Jeff Bezos, CEO of Amazon

In the beginning, it is easy to wonder how and when the cavalry will arrive with the supplies you need to survive in the wilderness. In the beginning, it is sometimes hard to imagine surviving at all. Well, first, trust that the cavalry will, indeed, arrive and second, start making lists of what you need to survive and who you know that will be able to help you with these needs. These "supplies" may come in the form of goods, services, volunteer hours and, of course, donations. However, your priority in this regard should include ways to get your mission in the community known and ways in which you can finesse the "ask." Someone once said, "if you don't ask, you don't get." Truer words were never spoken. So, determine to whom your ask should be directed and what form it should take.

Exercise: Using the table below, define your current level of support, mobilize your supporters and keep a record of your progress.

- How many people are aware of your cause? Name them along with contact information.
- How many of those are "supporters" willing to put effort or money behind your mission?
- Why would they be willing to support you?
- Write an elevator pitch (see next exercise)
- Then call them and ask for support and document their response. (And ask them if they know others who would support you!)

Name	Status: Aware or Supporter?	Motivation	Contact details	Contact outcome

Exercise: Write down your elevator pitch.

What is an elevator pitch? Well, imagine you get in the elevator with the CEO and he asks you, "what do you do?" How will you respond to that in 30 seconds while you are in the elevator? In less than 500 words, describe what you are doing, why you are doing it, who it will benefit, what you need to get started and what the supporter will get out of it (note – this will be slightly different per person).

Your Elevator Pitch...better known as the "Sales Pitch!"

Marketing: Getting the Word Out...

1. Materials that will attract donors:

Materials will need to be developed and printed that will be sent to potential donors. You will want them to know all the good things that you are planning for the community that will encourage them to partner with you by donating goods, services or dollars.

- 1) Develop a simple brochure detailing who you are, your mission, your goals or objective.
- 2) Seek out a volunteer in your community who has expertise in creating a logo that will identify you on all current and future marketing materials.
- 3) Create a letter targeting key potential audiences for donations (Your ask!)
 - a) Corporations
 - b) Individuals (grass root)
 - c) Wealthy donors

*TIP: It is helpful to provide statistics about who would benefit from your organization, such as number of people or percentage of population that need your services. This information can be found in your most recent census numbers which are available at <u>www.census.gov</u>

- 4) A return card with information that includes:
 - a) Name, address, email address, phone number
 - b) Amount given

*TIP: When you are established, you may create sponsor levels – e.g., platinum, gold and silver. State donor amounts needed to attain donor level status.

- c) A means of requesting to remain anonymous (e.g., checkbox on return card)
- 5) A thank you letter that your donor can use for IRS purposes stating the amount given with sincere thanks.
- 6) A way of tracking and storing all the above information which can be used for further community contact.
 - a) This can be accomplished with a simple EXCEL spread sheet. Donor software can be purchased down the road when EXCEL no longer provides appropriate support to a growing not-for-profit.

Examples of professional tracking software include: *Panorama Frontstream, Little Green Light, Bloomerang* (offers twenty-four-hour customer service on-line), *Donorperfect* among others

7) Be prepared to keep your organization front and center in the community with articles in local media about projects, accomplishments and upcoming events.

2. Materials to inform future clients of your services.

In addition to raising awareness with parties that can support you, you will also need to raise the awareness of your existence to your future clients by disseminating information about offered services.

Future clients will need to be able to find you. Consider placing notices any place where your prospective clients may see them! Future clients will need to know what services you are providing and how they might qualify for them and access them.

- 1) Create flyers that can be posted in various locations within your community announcing your services and how you may be contacted. These can be placed in high traffic areas such as:
 - a) Local schools and nursery schools
 - b) Laundromat
 - c) Community board at the library
 - d) Community board at the post office
 - e) Local restaurants
 - f) Churches/Synagogues
 - g) Community Center
 - h) Grocery stores
 - i) Drug stores
 - j) Senior Center
 - k) Senior living facilities
 - I) Train stations
- 2) Notices about the formation of your service may be placed in local media. Write up an informational article about this new venture and submit it for free coverage, rather than taking out an ad which will cost you precious dollars.
- 3) Place a notice in the bulletins of local houses of worship
- 4) Contact other service organizations that work with the same client population and let them know you are now open and ready to help in areas that are specific to your mission. Send them your brochure and several flyers so that they may post them and hand them out to clients.

3. A Speaking Tour

Your Board of Directors will need to become visible within your community. Prepare key talking points about your mission and goals and make appointments to speak about them and how you would like and need community support in order to succeed. Talk about the many ways that your community can make a difference in the lives of the clients that you hope to serve and ask those present if they can commit one hour a week to assist or donate any amount to help you succeed. Be sure to speak about your goals and describe your one-year plan and how you hope to achieve key goals. Ask to speak in the following places and take your brochures for distribution, a sign-up sheet for volunteers and donor cards for those who wish to contribute.

- 1) Your local Chamber of Commerce monthly meeting
- 2) Town board meeting

- 3) Library
- 4) Your local Rotary Club and other service clubs
- 5) Your school board monthly meeting
- 6) Church organizations
- 7) Other local not-for-profits

Target any place where philanthropic members of your community meet on a regular basis!

Exercise: Raising Awareness: Fill in the below table to generate a list of parties who need to be aware of what you are doing or can help you raise awareness for this new venture.

Index	Category	Specific Source	Reach (if known)	Contact(s) (if known)	Specific Ask (Time, Talent or \$\$)
1	Radio stations	e.g., "Pawling	XX subscribers	John and Jane Doe	Free
		Public Radio"			promotion
2	Newspapers				
3	News stations				
4	Local churches				
5	Town board				
6	Mayor				
7	Locally influential				
	parties				
8	Other				
9	Other				

Exercise: Honing in. Support comes in multiple forms: Money, Time and Talent

Using the table below, identify 5 people who will donate anchor money, why you think they would donate money, list their phone number, date of contact and ultimately, your results.

Name	Estimated Donation	Why they would donate	Contact information	Planned date of contact	Outcome

Identify 5 people who would donate their time. What skills/services can they offer that would be helpful to you? What is a reasonable ask of their time? When should they expect their time would be needed (during the week, weekends, after hours, on demand, other)?

Name	Estimated Time available	Why they would donate	Contact information	Planned date of contact	Outcome

4. Build A Data Base

There is almost nothing more important to the success of your mission than building a base of donors who are interested in supporting what you do. These names, addresses, phone numbers and email addresses are your greatest asset. These are the contacts to whom you will send updates through an emailed newsletter (check out <u>www.mailchimp.com/newsletters</u> for free newsletter formats), annual or bi-annual appeal letters, etc., in search of funding that will enable you to provide your services. Consider this database to be your life blood. It should be your goal to grow this on a daily/weekly and monthly basis.

There are several ways to develop and expand on this information. Below are some ideas for collecting needed names and contact data.

- 1) Set up a table at community events and ask community members to sign up for information and updates
- 2) Keep track of the personal information that comes back on your donor cards
- 3) Keep track of the information given to you by people who are interested in volunteering.
- 4) Enter data gathered from people using other services in the organization, i.e. the PRC enters information from borrowers of medical equipment into its donor database to be included in next biannual fundraising appeal
- 5) Have a sign-up sheet at any function or fund raiser that you host
- 6) Ask your board members to contribute names of friends (after they have secured permission from said friends, of course)

5. Building A Web Site

There are several free web site platforms available to build your business web site. These should be utilized first and can be changed and upgraded as time goes on and funds for more elaborate sites become available. A simple internet search will provide you with other options to explore. Your web site is where your community will go to find out everything there is to know about you. Try to find a community member who can prepare a web site and is willing to volunteer this service to you.

Your web site design is up to you. Based on our experience, we recommend including the following:

- 1) have all your contact information in an easy to find place
- 2) have your mission and list your services
- 3) be a clear expression of who you are and what you represent within your community
- 4) have a page on which potential volunteers may contact you

- 5) list your Board of Directors
- 6) have a page for newsy updates
- 7) have a page for upcoming events
- 8) employ pictures and graphics to attract attention
- 9) offer an opportunity to donate

6. Social Media

Today's society thrives on real-time access to information. Rarely can you walk down the streets and see people without phones in hand... so why not join the social crowd? Social media is a powerful marketing tool. By publishing regular updates about your efforts on social media you can rapidly access broad and diverse populations. If possible, seek a dedicated volunteer to manage your social communications. Provide this person with clear guidance about how to stay on message and the importance of privacy – not everyone wants to be part of this virtual network and careful consideration should be used, especially when involving children.

7. Forming Partnerships

Moving forward aggressively with your marketing plan will motivate other organizations within your community to find ways to support your efforts. Local government, community organizations and clubs, social service agencies and businesses may also share your desire to help citizens in need. For example, Scout leaders are often looking for ways to bring community service ideas to their troops. Leaders can be contacted with simple projects that can easily be planned and completed by the children in their charge. In our community, the Scouts conduct food drives, collect backpack supplies as well as supplies needed by community seniors. Also, our local Rotary Club initiates a Stuff the Bus event every July in order to help re-stock our Food Pantry during the slower months of summer. Rotary formed a partnership with our local school system that provided the bus, and the local union of school employees volunteered their driving and "stuffing" services. Additionally, our local supermarket management was thrilled to partner on this, and their generous donation of food, paper goods and \$5,000 in gift cards was an extraordinary display of generosity this past year. Of course, our Resource Center volunteers, along with Rotary Club volunteers, also stuffed, packed and raised awareness of PRC needs during the event, and the entire community had the opportunity to contribute in a significant way. All in all, this partnership was a win/win for all involved.

The PRC partnerships have developed over many years. Here are just a few more:

- 1) Our Food Pantry partners with other local food pantries in sharing excess donated foods.
- 2) Local churches conduct food drives, provide volunteers and offer program support.
- Municipal agencies, not-for-profits and other organizations, such as the Dutchess County Office for the Aging, Catholic Charities and Dutchess Outreach provide assistance, social services and helpful, up to date information for our clients.
- 4) The Pawling Recreation and Highway Departments and a few local businesses assist by donating transport and drivers to pick up thousands of pounds of donated food.
- 5) Local businesses donate supplies and services such as painting, storage, transportation and a local business coalition even sold fun t-shirts and donated the profits to us
- 6) Local public and private schools arrange food drives and in classroom outreach, supply volunteers and support internships

- 7) The AFYA Foundation picks up excess medical equipment that is distributed globally to areas of need.
- 8) The PRC partners with The Grand Rehabilitation and Nursing at Pawling, and the Lutheran Care network, organizations that provide vehicles to transport seniors to access food at Hannaford and the Food Pantry.

Partners come in many forms and contribute in many ways. They are invaluable to success and provide a way to reach more, do more, and provide more without having to invest precious dollars in expansion of infrastructure and personnel.

Staffing, Volunteers, and Training

"Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has." – Margaret Mead, cultural anthropologist

As with all growing businesses, whether not-for-profit or for-profit, the need for staff that supports the mission is crucial to success. Over the last forty-three years the staffing picture has changed considerably as the Center has developed and grown. At some point, it may also become clear to you that that your board members are unable to fulfill your burgeoning needs, each need with its own organizational requirements. At that point, it will be necessary to find an Executive Director who will take on oversight for your center. This is a paid position and, to support this successfully, it will be important that this expenditure be considered as part of your fundraising and budgeting goals. As the organization's services and community response increase, you may find you need additional assistance - such as a Program Coordinator or Volunteer Coordinator. The next section details responsibilities and qualifications for the key roles we have found necessary to run the Pawling Resource Center. Your roles may be different but, whatever they are – once you require them, you will need to define them and pay for them!

Staffing:

The Executive Director

A. Executive Director Responsibilities:

- 1) Management
- 2) Services administration
- 3) Volunteer support: Recruit and maintain an active volunteer roster
- 4) Public relations and communications
- 5) Fundraising
- 6) Event support
- 7) Record keeping and reporting: Oversee the input of all operating and program statistics, and author a quarterly report to the Board of Directors.
- 8) Grants Research and Submission

A. Executive Director Qualifications:

- 1) 5-10 years of relevant work experience in leadership/supervisory position for a non-profit or charitable organization
- 2) Ability to envision and implement programs
- 3) Program management
- 4) Ability to meet deadlines, find solutions, and prioritize
- 5) Strong interpersonal skills
- 6) Strong verbal and written communications skills
- 7) Working knowledge of computers and software

*In addition to the above, we have found that it is helpful if the Executive Direction is local to the environs and/or has a connection to the community.

The Program Coordinator

Paid assistants may also become necessary as the organization grows.

A. Program Coordinator Responsibilities:

- 1) Implement daily activities in support of programs,
- 2) Maintain office and Food Pantry activities which may include:
 - a) Answer phones
 - b) Handle requests
 - c) Greet and assist clients and donors
 - d) Work with individuals to help them find resources
 - e) Receive donations, and deliveries
 - f) Schedule volunteer drivers for medical transportation program
 - g) Work with and direct volunteers in absence of the Executive Director
 - h) Post notices on social media
- 3) Maintain and tally monthly statistics
- 4) Attend program and staff meetings.
- 5) Assist Executive Director where needed

B. Program Assistant Qualifications:

- 1) Good communication and computer skills
- 2) Ability to multi-task
- 3) Excellent people skills
- 4) Ability to update social media
- 5) Familiarity with the community

The Grant Writer

Grant Writer is possibly the hardest position to fill but is perhaps the most important other than the Executive Director. So why doesn't the Pawling Resource Center employ one? We haven't, yet, been able to afford one. Despite our many successes, a top-notch grant writer is still beyond the PRC's reach. At present, grant writing is handled by our Executive Director and a talented board member. However, it is an exceptionally time-consuming job and in an ideal world, we would be happy to bring one on board...yesterday! When considering filling the position for a grant writer, it will be important to make sure that they have:

- 1) Experience with government funders
- 2) A history of success in securing funds
- 3) Capacity to research possible funders

Volunteers

Without a cadre of Volunteers (the PRC has some 85 volunteers on board) critical tasks that make it possible for the PRC to provide its many services to those in need would not be delivered. Volunteers perform many tasks, including the following:

Volunteer Type	Responsibilities
Drivers	Pick up client
	Transport to appointment
	Wait for client at appointment
	Transport back to their home
	 Keep track of mileage if their own car is used and report to PRC for
	reimbursement (if reimbursement is desired)
Office support staff	 Take requests for transportation to medical appointments
	Offer food pantry assistance
	 Facilitate medical equipment loans and returns
	Receive donations
	Make referrals
	Copy and assemble bulletins
	Enter program data
Food pantry shelf	 Assist clients with refrigerated and frozen items from staff only areas
stockers, distributors,	 Shelve and restock food on "client access" shelves
and disposers	 Rotate shelved items so that shorter expiration items are moved to
	the front of the shelves
	 Remove outdated items according to regulations
	 Maintain clean shelves and display area
Medical equipment	 Facilitate filling out and retrieval of required forms
handlers	 Assist with the distribution of walkers, crutches, commodes, shower
	chairs and other miscellaneous equipment

Volunteers are the life blood of every non-profit organization. Some volunteers will be steady and come to support you on weekly or daily basis, and others will come in less frequently. Be prepared for the idealist who has the good intention of volunteering frequently, but only comes in for training and a few hours of support. But no matter what they give, give thanks. It is very important to offer recognition for their services – no matter how big or small a contribution they are able to make.

The PRC holds a volunteer brunch recognition event annually to thank all who contribute their time and efforts to the organization and their fellow community members in need. During the volunteer brunch, individuals are presented with awards for the contributions they make – every mile and every hour is accounted for. A photographer documents the event and it is posted to social media shortly thereafter. The event not only serves to recognize the volunteers – but it serves as a reinforcement for the board of the critical work being done by the Center. It is important that this kind of volunteer recognition is incorporated into your annual event planning program.

According to a 2019 survey of PRC drivers, 40% heard of PRC through a friend who volunteered, 20% from our website (<u>www.pawlingresourcecenter.org</u>) or postings around town, 15% from local media

reports, 10% from personal experience (parent or loved one was a client), and the other 15% just from word of mouth. Your search for volunteers should leverage all the channels at your disposal!

Training:

Whenever a new employee or volunteer comes on board to any organization there is always a period of adjustment and a learning curve to be overcome before they are fully functional. Because of the size of the Pawling Resource Center, training for paid assistants becomes the responsibility of the Executive Director. Volunteers are trained by staff and other volunteers; in addition, they are provided with written guidelines regarding the program operations. Volunteers are encouraged to seek out staff with questions, concerns and suggestions about protocol or process. The effort to train should not be underestimated, especially up to the point when you have a solid and reliable base of volunteers and/or devoted part time employees.

Scaling your operations

Once you have started your organization and set up your operations, it's time to think about scaling – that is the time to think about how to grow your organization while controlling and optimizing your cost base. Scaling will require a shift in mindset from the days when your organization was operating out of your basement. This shift in mindset is a progression. The table below shows a set of progressive views moving from what one might see in a small organization to what one might see in an industrialized organization. The items below are conceptual – but demonstrate the shift in thinking. The areas of consideration will depend on your vision and mission and how far along you go in the progression will depend on the degree to which you want to scale.

Area of	
consideration	Scaling progression
Geographic focus	My town \rightarrow Surrounding towns \rightarrow my county \rightarrow my state \rightarrow my country
Executive Leader	Doer: "I can do this in my free time" \rightarrow Doer: "I can do this as a dedicated
Mentality	role" \rightarrow I cannot do this on my own, I need to delegate some of this \rightarrow My
	leadership matters most, I need to delegate everything
Accountability	I do everything $ ightarrow$ We all work together $ ightarrow$ To optimize our costs and be most
	effective we need clear accountability and clear performance measures
People's roles	I wear all the hats $ ightarrow$ We all wear lots of hats $ ightarrow$ Roles aligned to skills and
	organizational needs
Emotional Mindset	"This is my baby" $ ightarrow$ This is business – I need to make decisions that optimize
	our ability to enable the greatest impact at the lowest possible cost
Priorities	Driven by whatever I am asked for $ ightarrow$ Driven by what is needed to enable the
	vision, the mission and create a path to long term growth, quality of service
	and cost reduction
Approach to teaching	Learn by doing; shadowing $ ightarrow$ Use of role descriptions and documented
volunteers	processes $ ightarrow$ Develop and maintain training manual
Communications	Word of mouth communications $ ightarrow$ Planned communications with clear
	distribution paths based on impact and messaging

The key point about scaling is not simply to focus on doing everything "bigger" – but rather to focus on doing more for less. This way of thinking is necessary as you are likely at some point to have called every friend you have, saturated your local volunteers and tapped out the leaders you are working with such that it is just not possible to ask them to work more – so you must think and work smarter.

A useful tool as you consider scaling will be the data you have collected. For example – if you pursue providing transportation, you can calculate the number of rides per driver to help forecast your future need if you decide to advertise your ride program. You can do the same for your food pantry – noting the amount of food coming in and going out and the number of families supported in the calendar year. By thinking two steps ahead, you can remove risk from your operations.

PRC's Major Programs

"No one is useless in this world who lightens the burdens of another." - Charles Dickens, writer and social critic

Below are our four major programs broken down into resources, physical components, compliance, process and setting expectations.

Although our early records do not provide adequate data to analyze our growth in each program, we can add some thoughts. First, you need to do a careful 'needs assessment' for your community. Where is it that you eventually want to be? Then look at our current position and resources to make realistic assumptions. If you want to be 15% of our scale by Year 3, you can estimate the resources and funding you will need from our tables. (Of course, our overhead is spread over four programs, so this is not an exact science. But it should give some preliminary benchmarks to guide you).

Food Pantry

Resources

Over the 37 years of operation, the sources of donations to stock the Food Pantry have been established, fluctuated, grown and become more regulated. Within the past five years, donations have increased significantly. Current resources include:

1. The Regional Food Bank of North East New York has been helping to feed the poor and hungry in our communities since 1982. It is the only organization of its kind in northeastern New York. The Food Bank collects large donations of food from the food industry and distributes it to charitable agencies serving hungry and disadvantaged people in 23 counties. The PRC applies to the Regional Food Bank for two grants annually, and they distribute funds through the Hunger Prevention Nutrition Assistance Program (HPNAP). Once awarded, the PRC receives a stipend (\$10,300 in 2019) to "spend down" on an extensive catalogue of food, as well as funds to offset the operating costs of the Pantry. The amounts awarded are based on numbers of people benefitting from food distribution by the Pantry.

The PRC orders from an online catalogue on the Regional Food Bank website, which includes salvage and USDA offerings, once a month on a specified date. After placing an order, the following week the Regional Food Bank delivers food via tractor trailer to nearby Brewster for all the area food banks. The PRC partners with the Pawling Recreation Department, Highway Department and several local businesses, which on alternate months send employees down with large truck to pick up the +2000 lbs. of food.

2. Partnerships with local grocers and other organizations: The PRC partners with local grocery store Hannaford, which, since it opened, allows the PRC twice a week to pick up food that is nearing expiration, or damaged but not unusable. This includes dairy, meat, produce, deli items and baked goods (bread and pastry items). Several years ago, the Regional Food Bank, as part of the "Feeding America Program," began monitoring these donations and requires weighing and monthly reporting poundage of these donations.

The PRC also partners with two local food pantries located in nearby Brewster, Putnam County, New York – the Brewster Community Food Pantry and Putnam CAP (Community Action Partnership). These agencies, in similar relationships, receive food donations from Acme, Trader Joe's and Tops. These pantries are open less frequently than the PRC Pantry, and arranged to share some of the bounty they receive with the PRC at the end of their service days. In 2019, the PRC received over 56,000 lbs. of food donated from these three sources. The PRC also shares excess food donations with pantries in Hopewell Junction, Dover, Patterson and Poughkeepsie. This bounty provides an incredible variety of nutritious food available to Food Pantry customers.

3. **Food drives:** Food drives are organized throughout the year by local schools, scout troops, businesses, community organizations, and religious institutions. Catholic Charities often invites the PRC to be a recipient of their large semi-annual food drives, which inevitably provides more varied food choices. Pawling Boy Scouts run a huge community drive in May, collecting, delivering, checking dates and shelving items.

In recent years, the Rotary has organized a large "Stuff the Bus" event to benefit the PRC. They partner with Hannaford, the Pawling Central School district, and CSEA (the local school employee union) bus drivers, parking a school bus at the store on a weekend day, distributing lists of needed items which store patrons then buy to help "stuff the bus." The event brings in, literally, a busload of food, paper goods, baby diapers, cleaning supplies and personal care items. Altogether, these food drives accounted for 8,943 lbs. of donated food.

4. Individuals and community donations: A sandwich board sign in front of the PRC driveway announces weekly what the specific needs of the Pantry are; at times, when items are running low, these requests are also shared on Facebook. Local individuals buy and deliver these items. People clearing out households deliver boxes of food to donate. In the summer growing season, home gardeners and local farms bring in fresh produce. In 2019 donations of food and personal care items from these sources totaled 3421 bags, an estimated 34,000 lbs. of food and other items.

Physical Components

These elements are necessary to operate a successful food pantry:

- 1. Space: The most obvious need for a food pantry is space, either designed, donated, or shared. This most basic element will determine the type of food pantry that can be established, and what the next steps will be. Some food pantries operate out of church basements or community centers, borrowing sink equipment and operating as a temporary food distribution site, without any storage space. Others, like the PRC, are in a facility where permanent storage can be established. Having a space with running water to adequately clean and sanitize is important. Since the 1980's the PRC Food Pantry has been located in the Carriage House of the historic home owned by the Historical Society of Quaker Hill and Pawling. They generously offer the use of the space for \$1 a year. It is through partnerships like these that the viability of such an organization improves.
- 2. **Shelving:** The first order for a permanent food pantry facility is a system of storing, organizing, and providing access to food and other items, which may include personal care items, paper products, household cleaning products, baby food, and pet food. Shelving can range from donated shelving, to easy-to-assemble metal or wire shelving kits, to more sturdy custom industrial products.

You will need to develop a floor plan, determine how many units will fit, and locate where they will be situated. Determine the depth, height and width of shelving units needed, assess the number of shelves and weight capacity required to determine your specific need. Search for used shelving, a dedicated donor or other means to acquire adequate shelving to display and restock all items to be offered.

3. **Refrigerators and Freezers:** Refrigerators and freezers will be needed for proper storage of many items and proper temperatures must be monitored with thermometers. Many organizations and individuals will donate household refrigerators or freezers; commercial units hold more capacity but are significantly higher in cost. Another option for active pantries is a walk-in unit. If you choose to support special events, you will also need to think about how to store volumes which may be significantly higher than your typical volumes (e.g., turkeys for Thanksgiving). For such situations, consider the potential for partnerships with local food vendors or organization, like the Fire Department, who may have excess freezer capacity. As well, a back-up generator is also worth considering – or at a minimum know who you can go to when you need to borrow one in the case of an emergency!

Compliance

Food pantries must comply with state regulations regarding handling and storage of food. These are different than those for soup kitchens. Some of the guidelines include how long various foods can be kept after expiration dates, how they must be stored, which foods can be broken down into smaller quantities, temperature guidelines for refrigeration, etc. Certain requirements must be followed to distribute USDA (free) food ordered from the Regional Food Bank of NENY (North East New York). The Regional Food Bank requires those that receive their funding to have a staff or volunteer attend a one-day training session every other year. They also require on-site inspections every other year.

Reporting and tracking usage:

- Clients must fill out applications and provide proof of eligibility (available in English and Spanish), at the start of each new year. The applications are short and simple – requiring address, contact information, household income, referrals, etc.
- 2. Each time they visit, the client must fill out a form which indicates how many individuals in their household are being served by the food received.
- 3. These numbers are tracked and reported to the Regional Food Bank of NENY each month. They form the basis, along with level of compliance, of determining the size of the stipend award that is received by the Regional Food Bank each year,
- 4. The personal information of clients is kept securely, and the household income, etc. is not checked for accuracy nor shared with any other organization, following the precepts of respect and confidentiality.

Process

Creating a schedule of visitation, publicizing and staffing your pantry

1. **Determining your guidelines:** In setting up your food pantry, you must determine your own guidelines. Some of the questions to be asked are:

- a. Who are the population to be served?
- b. How will you track and regulate usage? Will you require references, proof of eligibility, income guidelines etc.?
- c. Is the service area defined within a geographic region or other? The PRC requires that an individual in the household live, work, attend church or have a child in school in Pawling. They must provide proof of their eligibility in any of these categories.
- d. How often will the pantry be open to serve the public? Some organizations are open once or twice a week, some only once a month. The PRC food pantry is open 6 days a week, Monday through Saturday.
- e. How many times per month can clients visit? The PRC pantry allows clients to visit twice a month, with extra distributions at the holidays.
- f. How will the clients access the food will it be self-choice, or a determined amount that is pre-sorted and bagged?
- 2. How much food will you distribute? The Regional Food Bank requires pantries to provide a 3-day supply of food for a household utilizing the pantry. In order to manage the amount of food distributed, the PRC has developed guidelines that help to establish that clients choose appropriate amounts of items from each category, based on the size of their household. Initially we allowed people to get allotments only once per month, but now allow twice.
- 3. What other factors determine food pantry usage? If persons who come in for assistance do not meet the requirements of the PRC, they will be able to access food on that day. A staff or volunteer will then give them specific information on an appropriate food pantry in their community. The Regional Food Bank website offers a "food finder" link for finding a nearby pantry in the region. It is the policy of the PRC to <u>always</u> err on the side of compassion.
- 4. **Staffing:** The PRC works to maintain an adequate staff and volunteer base to assist clients, maintain relations with food providers, pick up food, properly store, cull and distribute food, restock shelves, place orders, and maintain all aspects of the pantry
- 5. **Publicizing and disseminating your presence:** Raising awareness can be done via website, regional food bank, local faith-based organizations, newspapers, etc., United Way 211, volunteer organizations, etc.

Statistics and Sca Our 2019 Food Pa	l <mark>ing</mark> ntry dynamics were:	If 3 Year Goal is 15% of this: *		
Households Servic	ed 242		36	
Donated Food (inc	l Food Bank stipend) 124,000 lbs	9,300) lbs
Direct Ope	erating costs	46,721		4,251
Fundraising, Administration		9,457		1,437
Fully	Allocated costs	\$56,178		\$5,688
Volunteer Hours	876		131	
# of Volunteers 15 office + 3 dedica		ated	3 office + 3 dedicated	

*CAVEATS: 15% projected fully allocated costs exclude paid positions, but you'll need extra passionate board and volunteers to cover those duties. As a start-up, we only allowed 1 visit per month, so food needs were halved.

Transportation Program

Resources

- This program operates with the assistance of PRC staff office volunteers, and volunteer drivers. Rides are provided by volunteer drivers to access medical care and food.
- 2. Homebound Delivery is offered where volunteers assemble a phoned-in food order to be delivered to the home of a client who is unable to travel to the Food Pantry.
- 3. Drivers must have a valid license; during transport they are covered by PRC insurance; they may drive their own vehicles or a PRC owned car.
- 4. Funding is essential, to fund the purchase of a vehicle, and staff hours in program management and reporting.

Funding options:

- 1. **County agencies:** The PRC receives funding from Dutchess County Office for the Aging's (DCOFA) Senior Transportation program. A grant application must be submitted every three years, and money is awarded based on miles driven.
- 2. Other Grant agencies: The United Way of Dutchess and Orange Counties (UWDOR) requires an extensive application and reports every year, and funds the PRC's program with an award that ranges between \$5000 and \$10,000, depending on their priorities and monies available.
- 3. Private funding: Private and family foundations might fund this program.
- 4. **Fund drives**: Each year the PRC holds a "Walk So They May Ride" Walk-a-thon. The income garnered from this event has risen from \$13,000 in 2008 to over \$24,000 in 2019.

Physical Components

This program is coordinated at the PRC office, and requires the usual office furnishing and supplies. They include: office space, a desk, phones, a computer, computer software for Program Management (Optional). The Vehicle is the key requirement, which is licensed and insured by the PRC. It was purchased with the assistance of a donation, however, maintenance expenses, driver reimbursement and fuel charges are ongoing expenses to the Center's bottom line.

Compliance

For the rides to medical appointments service:

- Clients must fill out a brief application and sign off on receiving the guidelines. They must call with requested rides, within a 45-minute radius of Pawling. They must be residents of the town of Pawling, which includes part of the hamlet of Holmes. They must be ambulatory. No emergency ride service is allowed.
- 2. Detailed statistical gathering of rides, mileage, clients, destinations, drivers, demographics of clients must be accumulated and used to report to DCOFA each month, and United Way twice a year to justify the monies donated.
- 3. DCOFA "reimburses" the PRC for miles driven at a rate of \$1.20 per mile, up to \$7450 per year.
- 4. United Way supplies a flat grant amount. Detailed mid-year and final outcome reports are required, as well as an annual site visit.

- 5. All drivers must have valid driver's licenses and agree to a DMV license report. Drivers (and clients) receive a basic packet of guidelines outlining program operation. Drivers must report their miles driven each month, whether or not they are reimbursed.
- 6. All insurance for vehicles and driver liability must be kept up to date, regardless of whether drivers utilize the PRC car or their own private vehicle.

For rides to shop service:

- 1. A smaller list of volunteers (and staff members) will drive clients to access food at Hannaford in Pawling, or the PRC food pantry, or deliver to their homes from the Food Pantry.
- 2. The PRC partners with The Grand Rehabilitation Center and the Lutheran Care ministry which provide vans to transport seniors to the Food pantry, and to Hannaford on specified days. The Grand's van is also wheelchair accessible and allows disabled residents of the Hamlet, independent senior living facility, to have access to transportation to food.
- 3. The PRC has, within the past two United Way grant cycles, included food access as part of the transportation program for which it requests funding.

Process

Clients call in ride requests. A Ride Request form for each ride is made. Then office staff or volunteers call drivers from our current list of 45 drivers, until one accepts the ride. Driver must call the client to arrange for pick up. Drivers are then required to submit mileage report to the PRC by end of month. These statistics are tallied and reported to DCFA each month for their grant which reimburses for miles driven, up to a ceiling of \$7450.

Volunteer drivers are recruited through notices in local papers and church bulletins, social media posts, the sandwich board on site, posts on volunteer recruiting sites, e.g. United Way and other volunteer organizations and word of mouth.

Statistics and Scaling

Our 2019 Transportation Program dynamics were:				<u>I</u>	If 3 Year Goal is 15% of this: *		
Individuals Serviced	1,603				240		
Direct Operating costs <u>Fundraising, Administration</u>			40,257			3,176	
			8,147			1,239	
Fully Allocated costs			\$48,404			\$4,415	
Volunteer Hours	2,579			38	37		
# of Volunteers	40			6			
Miles Driven	22,873			3,43	31		

*CAVEATS: 15% projected fully allocated costs exclude paid positions, but you'll need extra passionate board and volunteers to cover those duties.

Medical Equipment Loans

Resources

Like much of what the PRC receives in goods, the medical equipment that is part of our loan program is all donated. The biggest challenge is having adequate and accessible storage space. Wheelchairs, rollator walkers, shower seats, and other medical aides take up a lot of space. Hospital beds are stored off-site in a donated storage unit. Our partnership with AFYA, a Yonkers, NY based organization, ships donated equipment to areas of need throughout the world. They pick up our excess equipment about 6 times a year.

Physical needs

A reasonable amount of space is needed to store, access and disseminate the medical equipment. The PRC currently uses the upper level of its building to store items transportable by one person. This is not ideal, as the space is accessed through a set of steep stairs and many of the Center's volunteers are seniors, thus carrying heavy equipment up and down the stairs is a challenge. Additional off-site storage or an outdoor elevator have been suggested as solutions.

Compliance

- 1. All equipment must be sanitized when it is donated or returned.
- 2. Stock is inventoried and reviewed by an Occupational Therapist periodically for safety. Items that are donated which are in poor condition are discarded.
- 3. Clients who will use the items, even if not present, must sign a release form; a relative having power of attorney may sign in their stead.

Process

- 1. Clients or family members must pick up and return items, as the PRC does not have the capacity at present to deliver medical equipment.
- 2. A form is filled out for each loan listing items borrowed, and dates, and requiring release signature.
- 3. Loans are tracked, and numbers of items loaned, returned and donated are counted and entered into a spreadsheet each month.
- 4. In 2019, 661 units of medical equipment were donated. Though items are tracked upon loan and return, there is little need to follow up on unreturned items, because of the amount that is donated. Occasionally there is an exception if there is an unusual item of particular desirability and need (i.e., the PRC currently has two "knee scooters" which were donated and out on loan, which are very much in demand).
- 5. Because the PRC is the only organization within a 25-mile radius which operates such a service, loaning medical equipment has become a very active program in the past few years. Nearby hospitals and rehab centers disseminate information to discharged patients about the service.
- 6. Because there is such an overwhelming need, and an abundance of equipment, this program is not geographically restricted. Anyone who needs to borrow may do so. Items which are in short supply might be earmarked for loan to Pawling residents.
- 7. Hospital beds are heavy, large, disassembled for storage, and require two strong people and a van or pickup to be transported. The PRC requires a family member to arrange for such transport. A PRC board member oversees the storage unit and the loans and returns of beds, and personally meets the clients to allow access. Because there is occasionally a need for an ailing client with no support system for finding transport, the PRC has endeavored to find a reserve of people who might

transport in an emergency. Occasionally the nearby private school, Trinity Pawling, or Fire department volunteers, provide muscle and a truck to move the beds.

Statistics and Scaling						
Our 2019 Medical Equip	Our 2019 Medical Equipment Loans dynamics were:			If 3 Year Goal is 15% of this:*		
Equipment Loans	601		90			
Direct Operating	g costs	7,172		1,717		
Fundraising, Administration Fully Allocated costs		1,452		221		
		\$8,624		\$1,938		
Volunteer Hours	134		20			
# of Volunteers	3		3			
*CAVEATE, 150/ projected	Fully allocated	ante avaluda naid	positions but you	Il nood overa passiona		

*CAVEATS: 15% projected fully allocated costs exclude paid positions, but you'll need extra passionate board and volunteers to cover those duties.

Compassionate Offerings

Resources

- 1. Holiday and sunshine baskets are created for seniors and those undergoing a medical issue, upon request. Baskets are donated along with various fill items. Wrapping supplies, volunteer time and a list of designated individuals are needed to execute the program.
- 2. Backpacks and supplies are donated by the Rotary, girl scouts, other org's and individuals; a Go Fund Me was posted in 2 consecutive years to purchase additional supplies. The Resource Center works with local stores (i.e. Staples or CVS) for discounts and donations; PRC clients sign up to obtain backpacks and if available, additional backpacks are given to anyone who requests them.
- 3. Coats are donated by individuals and coat drives are sponsored by various groups.
- 4. An "Adopt a Family" program brings together, anonymously, clients who cannot afford to buy gifts with community members, "adopters' who wish to buy clothing and toys specifically needed and requested.
- 5. Two large copiers and one folding machine are used to make bulletins, flyers, brochures, etc. for local religious institutions and not for profits. Paper, toner, and staff time are needed to provide this service.
- 6. A Health Care Provider Resource list is provided to individuals requesting aides or home care services. The PRC maintains a list of providers, their skills and training, and passes it along, upon request, with the caveat that we do not interview or vet the individuals who have asked to be included on list.
- 7. The PRC has put together an extensive Resource List of County agencies and regional organizations that provide services. This list is used internally by staff and volunteers when responding to calls seeking services we do not provide.

Physical needs

As delineated above, these services can be offered using normal business furnishings and supplies, except for the paper folding machine, which is necessary when providing copying services. Additionally, the storage space needed to hold supplies to fill baskets, backpacks etc., is a requisite to being able to

offer such services. In summary, you will need space for storage, phones, a desk, a computer, copiers and folding machines.

Compliance

Most of the PRC's compassionate offerings are designated for Pawling residents, organizations or PRC Food Pantry clients. Moreover, the PRC does not interview or vet the individuals mentioned on the healthcare provider list, and anyone receiving the list must sign a release to that understanding. Referrals are given to anyone who calls with a request.

Process

- 1. Baskets are made for seniors at holiday times; people experiencing serious health issues, throughout the year (sunshine baskets); Easter baskets for children of food pantry clients. Sign-ups for Easter baskets, or requests for gift baskets by a friend or relative initiate the process.
- 2. PRC clients sign up for backpacks and if available, additional backpacks are provided to persons who request them that did not sign up.
- 3. Coats, outerwear, hats, scarves, and many other unusual items are available in the entryway to be taken by anyone. This program is not monitored. We give out everything that is donated.
- 4. In early November Food Pantry clients can sign up to be Adopted as part of the PRC's "Adopt a Family" program. As part of this, these families receive presents purchased specifically for their children. Families fill out a form with the age and gender of their children and list three items of clothing that the child needs and one preferred fun gift or toy. "Adopters" can sign up to purchase gifts, requesting a family size of small, medium or large. They are paired anonymously by a number system with an adoptee family. The PRC acquires and wraps additional toys and games to add to the family's gifts. Adopters, who must be urged to keep purchases within a monetary ceiling to ensure equitable distributions, deliver all gifts by a specified date, and the Adoptees are then called to pick up their gifts.
- 5. Copying is requested by area organization and is provided by a staff member, who works on Wednesdays and Thursdays. Organizations usually make an annual donation, and or provide paper and toner.
- 6. Health care provider list: community members request the list, sign a release, and receive the form in person, via mail or email. Providers request to be added to this list and the list is updated periodically.
- 7. Referrals are provided to callers with questions regarding available services, utilizing the in-house Resource List. This list is refreshed periodically.

Our 2019 Compassionate Offering of	dynamics were:	<u>lf 3 Year Goa</u>	al is 15% of this:
Individuals Serviced 432		65	
Direct Operating costs	23,457		1,912
Fundraising, Administra	ation 4,737		722
Fully Allocated cost	s \$36,007		\$2,633
Volunteer Hours 283		42	
# of Volunteers 9		2	

Statistics and Scaling

*CAVEATS: 15% projected fully allocated costs exclude paid positions, but you'll need extra passionate board and volunteers to cover those duties.

A Final Thought

"Life is an exciting business, and most exciting when it is lived for others." - Helen Keller

We are so excited that you have decided to create a Resource Center for your community! For all the advice and detailed information that we have offered here, we know your path will not be the same as ours. But we hope that the information we have provided will guide you and help you to go faster and stumble a little less often... Ultimately, we hope you can use this information to advance the stir in your heart and create that positive impact for your own neighbors in need!

Addendum - In the time of Covid-19

"It is under the greatest adversity that there exists the greatest potential for doing good, both for oneself and others." – Dalai Lama

In March 2020, the world turned upside-down with the onset of Covid-19. New York state was hit early and extremely hard. Because of this, we were forced to grapple with a new world order without much in the way of direction. The Pawling Resource Center, under the supervision of a steady-handed Executive Director, met the challenges of a community with exploding needs.

As our neighbors in need grappled with Covid 19, the Pawling Resource Center has remained open and indispensable to their well-being. Partial staff and a group of intrepid volunteers have worked throughout to ensure that the Food Pantry shelves have remained stocked, and that our home bound food delivery services have been able to meet the increased demand during this precarious time.

During the months of February and March, when the deadly coronavirus was emerging in the New York area, many of our community's most economically vulnerable workers were furloughed, laid off, or newly unemployed, and their children, no longer able to attend school, experienced increased need for nutritious meals, so crucial to their development

The decision to keep the Food Pantry open was undertaken with the idea that our organization is key to providing services in times of crisis. As the scope of the pandemic unfolded, each week would require a new set of protocols established for the Food Pantry to continue operation safely. Services were set up for food to be prepacked and delivered for pick up outdoors, or remotely to homes, and a new initiative to shop at grocery stores was established. As many older volunteers and one staff person declined to participate, a host of brand-new volunteers offered their services to help pack boxes, pick up donated food and deliver food. Each week's challenges were met and overcome. Food shortages and hoarding caused problems with getting basic staples to provide to clients who were extremely anxious and fearful.

Our community generously stepped up, delivering boxes of food and paper goods, organizing food drives, and sending generous donations. Many new clients came to utilize our Pantry, learning that we were open and available through churches and Municipal agencies. There was a 22% increase in new clients within a few short months, as community need multiplied.

Local grocers, farms and farmers markets have flooded the pantry with nutritious produce and meats, and the challenge has become finding space to adequately store the bounty.

Transportation services were suspended in March. They have begun to reopen slowly in July with a largely diminished pool of drivers.