

Mid-Ohio Foodbank Volunteer Manual




Master Template



Table of Contents

This table of contents will guide you through the sections of this template. It is composed of common areas of essential information that would address the needs of *any* pantry. You may need to create a comprehensive table of contents to follow the path of your individual operation guide. Remember to include any necessary information that may be specific to your organization, if it is not covered in this example.

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 When you see this symbol in the *Table of Contents*, you will find a worksheet to help you catalogue information. Also, look for helpful tips, examples, and reminders in boxes like this one or the “post-it” notes throughout this document!

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Mission & Vision of your organization

- If your organization does not have a “**mission**” formally stated, take the time to define your purpose. Summarize that information and convert it into a statement. This is your mission.
- Need a “**vision**” statement? The vision should show the desired future state of the organization and/or an ideal picture of what the organization wants to accomplish.

Our Mission:

Example:

Mission

To end hunger one nourishing meal at a time and co-create a sustainable community where everyone thrives.

Vision

A hunger-free, healthier community

Our Vision:

Acknowledgements

Use this space to recognize all of the important contributors to your organization, for its insured and continued success.

Example:
Major donors,
sponsoring
organizations,
private
businesses,
volunteers,
staff, etc....

Purpose of the Best Practice Guide

Please describe the reason for this guide. It will help readers understand how to implement the practices discussed, and give a clear look at how the manual should be used.

Example: The intent of this guide is to reveal how to operate the *Kroger Community Food Pantry*, allowing for a more sustainable emergency feeding program. It is designed for staff and volunteers to utilize in order to gain an understanding of daily responsibilities and overall general policies & procedures.

Days & Hours of Operation

Observed Holidays

New Year's Day
Thanksgiving Day
Christmas Eve
Christmas Day

Fill in the hours of operation for your organization. Please fill in "closed" for days that you are not open for business. You may also want to make a standard holiday schedule listing the **holidays observed** by this establishment, it is acceptable to leave the actual dates out as some may change annually.

*Hours of operation must be posted for public display

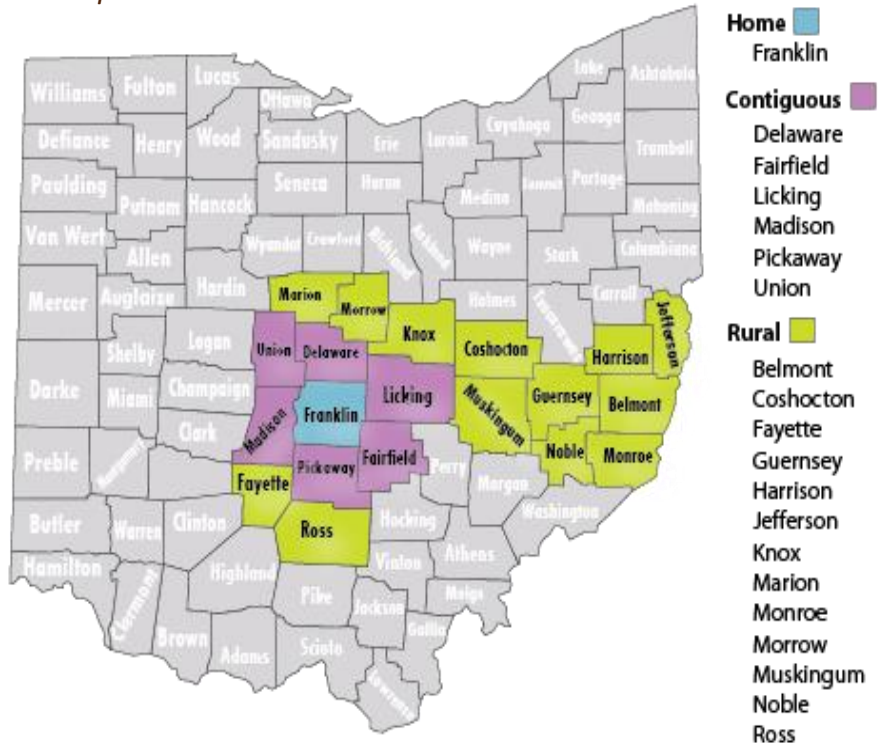
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday



Service Area

Does your organization serve anyone, or do you have distinct zip codes that you serve? Remember upon the first visit regardless of stipulations clients must be served for that visit, they can then be referred to a different pantry.

Example: Service area for Mid-Ohio Foodbank



Add a picture!

An image is an interesting way to add a visual representation of the material you are covering. **Here, you can include a map of the zip codes your organization serves.**

Food Pantry Operations & Responsibilities

Do you offer a choice or traditional model pantry? What benefits are there to the style mentioned?

Example:

- We are a **choice pantry** because it gives our clients dignity to shop for the items they need, and it reduces waste.
- We are a **traditional pantry** due to limited space. This arrangement allows for greater efficiency when serving clients.

Please explain individual responsibilities for the pantry director and pantry coordinator. In the event of leadership transition, how would the responsibilities transition? *See the succession planning worksheet in the appendix.*

Director Responsibilities:

Coordinator Responsibilities:

Example:

Coordinator is responsible for unlocking doors and ordering food from eHarvest.

Check-In Process & Required ID

What is the check-in process for clients at your pantry? What documentation do you require for clients to take food home? What is your proxy policy?

Example: A piece of mail must accompany new clients to show residency.

Acceptable forms of Identification for this location are as follows: photo ID, birth certificate for children under 18, school ID, health insurance cards, passports.....



Adjust the table below to reflect the types of identification **you accept**.

Age	Driver's License	State ID	Passport	Naturalization Papers	School Id	Health Card
Over 18						
Under 18						

Distribution Policy

Pantries usually agree to serve clients depending on food supply, storage capacity, and staffing. Please describe the current policy in place for your pantry.

How often can a family receive food from your pantry for a full shopping visit? How many times a week can they receive bread & produce only, or emergency boxes?

Remember:

All member agencies must serve at least three days of food per household once a month.

Open to Close Daily Operations

Each food pantry operates differently. Please take the time to catalogue daily tasks and responsibilities performed by staff and volunteers. A checklist may be the easiest way to guarantee all tasks are completed each day.

Daily Task *Opening* Checklist

How do you get your day started in the pantry? What is the first thing that you do when you come in? What tasks need accomplished immediately? **Are there different tasks for different days?** If so, make lists specifically for certain days of the week!

Open to Close Daily Operations

You can make many more lists to identify important tasks that need completed throughout the day. An opening and closing checklist will ensure the most important things are done regularly.

Daily Task *Closing* Checklist

What is the last thing that you do before you leave? How do you end your day in the pantry? **Do you have specific things that need cleaned, turned off, or locked?** Are there different tasks for different days? If so, make a list exclusively for those days.

*See appendix for a sample cleaning checklist

Orders & Inventory



As a Mid-Ohio Foodbank partner agency, you have the ability to acquire food and grocery items directly through the eHarvest online ordering system. It is a simple and convenient way to restock your shelves. Inventory items change frequently, it is best to check the inventory listing very early. The system syncs daily, and new items are added each morning between 7 am and 7:30 am. The system may be temporarily unavailable until after the syncing process is complete. All placed orders are eligible for pick up or delivery within Foodbank guidelines. Keeping track of your own inventory will be beneficial when re-ordering product.

eHarvest Orders

eHarvest Tip #1

Bookmarking this web address in your internet's "favorites" settings will allow for quick and easy access.

The eHarvest online ordering system can be found by typing <http://mofb.scsi-usa.com> into your internet web browser, as pictured below.



eHarvest Orders

To access eHarvest you will need a Login ID, which is your agency number without the preceding zeros. Include your agency number in your guidebook for easy access; remember a password is also required for login. Passwords are assigned through Mid-Ohio Foodbank. If you do not have a password, one can be requested by emailing the Orders & Customer Service Coordinator. Place your first name in the “ordered by” field, then click login.



Login:

Password:

Ordered by/
Picked up:

Login

Did you know?

You can request to have your password changed through the Orders and Customer Service Coordinator.

Just call (614)317-9426

The eHarvest homepage also displays important news and updates from Mid-Ohio Foodbank. There are always printable versions of current forms, the monthly newsletter, and a host of other useful resources to keep you up to date on current policies and procedures. There is even a more in-depth guide to walk you through the eHarvest ordering system!

eHarvest Tip #2

When selecting product, pay close attention to the packaging information. Ordering a gallon of salad dressing may not be beneficial for a food pantry, but could very well be useful at a soup kitchen.

Pick-up orders are available at Mid-Ohio Foodbank:

3960 Brookham Dr. Grove City, OH 43123

When picking up an order, check-in with the Agency Services front desk. Please observe all warehouse rules and safety regulations. After orders have been loaded, see the receptionist to sign an invoice.

Inventory

Knowing what products you have in stock makes it convenient to order more food when you can see exactly what items you may be out of, or to keep track of what stock is running low. Having access to that information before ordering will give you a scope of what to shop for, and how much space you have for new items.

Shelf-Product Inventory list	Date: / /	Date: / /	Date: / /	Date: / /	Date: / /
Beverages					
Canned Meat/Soup					
Cereal					
Canned Fruit					
Grains: rice, pasta, etc...					
Protein-non meat					
Canned Vegetables					

Making a few spreadsheets to keep track of your inventory is easy. You can group the categories and have a list for dry goods, refrigerated/frozen items, and household products.

Alternate Sources of Food

All agencies do not receive food solely from Mid-Ohio Foodbank. If your organization receives food through other sources, document the details of the relationship to ensure that the staff at your organization will be able to anticipate deliveries or pick-ups that need maintained. You may also want to create a standard list of main contacts, and even local gardeners that bring you food regularly. Include names, address, whether food is picked up or delivered, and phone numbers.

Company	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<i>Example:</i> Kroger 3211 E. Broad St.		<ul style="list-style-type: none"> ▪ Pick-up ▪ 3 pm ▪ Ask For David 				
Mid-Ohio Foodbank 3960 Brookham Dr.			Produce Wednesday 1-3:30pm			

Pantry Shopping Visits & Emergency Boxes

To help manage inventory some pantries provide emergency or overnight boxes for clients that do not have an appointment to shop at the pantry. Typically these boxes contain enough food to feed a household for one to three days. Having a *packing chart* makes it easy for volunteers to pre-pack the boxes with shelf stable products. Make multiple charts to catalogue what each box should contain. **You can even use the same chart template to determine how much food per family size is allotted during a full pantry shopping visit.**

Emergency Pack Selection Chart		Name of Packed Item <i>Ex. Canned Fruit</i>	
Family Size	1-3	4-6	7 or More
Number of choices			

Food Safety

It is vitally important for agencies to implement proper food handling measures to ensure that any product being distributed to clients is safe for consumption. All Mid-Ohio Foodbank member agencies will need a representative of their organization to undergo a food handling certification course every three years. If the representative with the food safety certification leaves the organization, a new representative will need to attend the class within 3 months.

Please contact
Mid-Ohio
Foodbank for
Food Safety
training
opportunities.

Food Safety

The following food storage guidelines highlight some of the practices member agencies should follow:

- **Baby food and formula should NOT be distributed after the expiration date.** All baby food and formula products stored that are beyond date of expiration should be discarded and not distributed to clients.
- **A best by date is not an expiration date!** Other food may still be eligible for distribution past the best by or use by date. See the food quality expiration guidelines in the appendix for more information.
- Clean floors, pallets and shelving regularly.
- Food must be stored and distributed so that cases with the oldest receiving date are used first. Utilize the first in, first out method.
- Keep doors, windows and roofs well-sealed to prevent pest entry and water damage.
- There should be no smoking or eating in food preparation areas.
- Maintain pest control systems; have a contract with a licensed pest control firm.
- Maintain equipment regularly; check freezer and refrigeration units for temperature, leaks and malfunctions.

Food Safety Tip

Date products as you receive them; it is an easy way to ensure older items are distributed first.

Did you know?


Many of the items on this list, as well as the information found under “storage” are key areas that are checked during a monitoring visit.

Storage

Proper storage of food is an integral part of food safety. It insures that the food you serve to clients will be healthy and safe to eat.

- Store food and other products 6” off the floor (or a pallet) and 4” away from the wall, and 4” from the ceiling.
- Non-food items such as cleaning and maintenance supplies must be stored separately from food.
- Maintain proper temperatures in all storage areas; keep thermometers in all cold storage units; maintain temperature logs.

Storage Method	Proper Storage Temperature
Refrigerator	41 degrees or below
Freezer	0 degrees or below
Dry Storage	50-70 Degrees



*For more information about the shelf life of food please see the shelf life reference guide the appendix.

Storage, *Temperature Log*


Here is a basic example of the daily temperature log that all food service agencies should have. A thermometer should be in dry, refrigerated, and frozen storage areas. Information should be updated every day the pantry is operational.

Daily Temperature Log

Agency: _____

Month: _____

Year: _____



Mid-Ohio Foodbank

check box for storage type, write in location, name, or unit #:

<input type="checkbox"/>	DRY STORAGE	50° - 70° F	Location, Name, or Unit #
<input type="checkbox"/>	REFRIGERATED STORAGE	35° - 40° F	_____
<input type="checkbox"/>	FROZEN STORAGE	0° F or below	_____

Date	Time	Temperature	Initials
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			

Date	Time	Temperature	Initials
17			
18			
19			
20			
21			
22			
23			
24			
25			
26			
27			
28			
29			
30			
31			

Form Instructions:

Purpose: Maintain a controlled process to ensure that food is stored at the correct temperatures.

Usage: Use a new sheet for each month, for each individual refrigerator, freezer, or storage area.
 Record temperature readings for each day when the pantry is open or staffed.
 Include initials of the person reading the temperature, and the time the reading was taken.

Filing: Retain for a period of 3 years. These logs will be reviewed by during annual monitoring visits.

Reference: Ohio JFS Food Programs Manual, Rev. February 2012, Pages 15-16

Form: TEMPERATURE_LOG_2012_Rev2

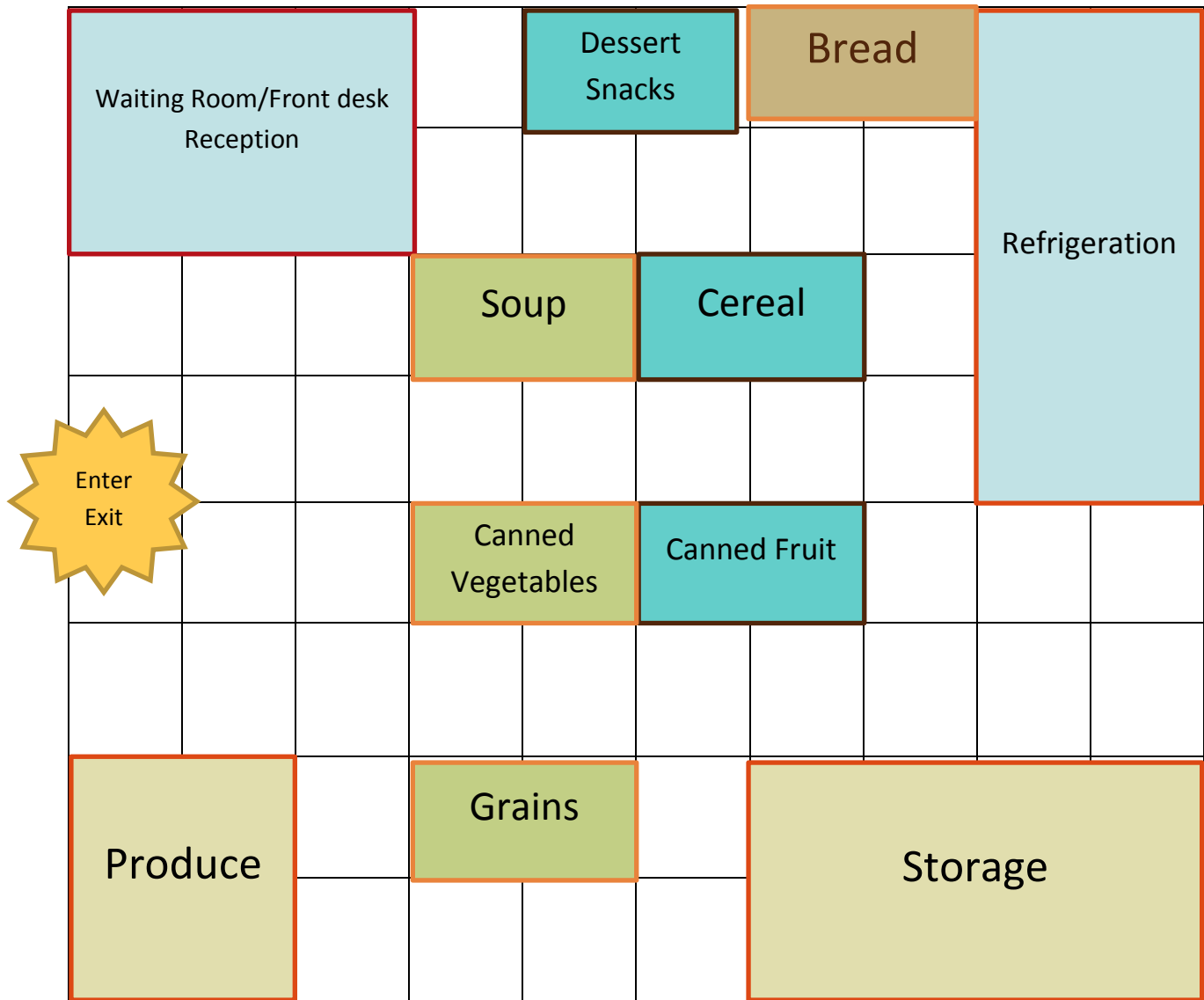
Mid-Ohio Foodbank - Agency & Program Services

Did you know?

Copies of this form can be found on the eHarvest homepage!

Floor Plan

Having a designated area for all of the items in your pantry is helpful to both volunteers and clients. A smart layout can be great for traffic flow, as well as mapping the areas that house particular items. It may even help you to organize or rearrange your space. Use the grid below, or create your own grid. **Rearrange the boxes** to correspond with your current layout. Arrows can be used to draw traffic flow patterns. It is also a great way to identify emergency exits!



Keeping Records



Keeping an accurate account of the people served by your organization will lend easy access to valuable statistics.

This can be particularly useful when writing grants, contacting elected officials to advocate for your program or funding, or even the occasional unexpected media article about your organization.

Knowing how many people you serve on a regular basis will also help with placing orders.

There are various types of records that should be tracked, including client eligibility forms, donations, volunteer hours, invoices, and finances.




Reminder!

Mid-Ohio Foodbank requires all partner agencies to keep copies of client intake forms, temperature logs, agency monitoring acknowledgement forms, civil rights training documents, client statistics, and ordering invoices for **three years**.

Keeping Records, *Tracking Statistics*

Mid-Ohio Foodbank requires all program sites to report monthly service records by the 10th business day of each month. There are a variety of options when it comes to entering monthly statistics, but reporting online through eHarvest is the most convenient and preferred method.

Here is a brief example of a statistics form distributed by Mid-Ohio Foodbank.

 Mid-Ohio Foodbank 3960 Brookham Drive Grove City, OH 43123 Orders: (614) 317-9426 Toll Free: (800) 349-3663 Main: (614) 317-9701 Fax: (614) 317-9708	PRINT
	EMERGENCY MEALSITE STATISTICS (SOUP KITCHEN/SHELTERS)
Month of: _____, Year: _____	
Agency Name: _____	
Address: _____ _____	
Agency ID Number: _____	
Name of Preparer: _____	
Phone Number: _____	
Fax Number: _____	
Email Address (optional): _____	
Number of <i>PEOPLE</i> served (head count): _____	
Number of <i>MEALS</i> served (plate count): _____	
Number of days on which meals were served: _____	
Type of meal:	breakfast _____ lunch _____ dinner _____ snack _____
This report must be received by Mid-Ohio Foodbank <i>before</i> and No Later than the 6th working day of each month. Otherwise, we must place your agency on "HOLD," and you will not be able to order product until we receive your statistics. Thank you.	
Mail to: Mid-Ohio Foodbank 3960 Brookham Drive Grove City, OH 43123 Fax to: (614) 317-9708	

If you are using **PantryTrak**, it is very easy to capture statistics for each month.

See the full PantryTrak manual for details.

Keeping Records, *Documenting Donations*



The Good Samaritan Law is in place to “*protect citizens, businesses, and nonprofit organizations that proceed in good faith to donate, recover, and distribute excess food. It limits liability to acts of gross negligence or intentional misconduct and, absent these, donors and others shall not be subject to civil and criminal liability arising from the nature, age, packaging, or condition of the apparently wholesome food of the apparently fit grocery products received as donation.*”

Describe the process for documenting donations that come into your organization. Include instructions for monetary, food, and in-kind contributions.

Name & Address of Donor	Date of Donation	Donation Type	Amount of Donation
John Doe 108 E. Street Columbus, OH 41111		Food Dry goods	126 lbs.

Questions to Consider:

- Is there a certain area where large food donations should arrive?
- Do you weigh all food donations prior to stocking them?
- What is the salvage process?
- Do you have a donation receipt book?
- What information should be captured from the donor?

*See the appendix for a sample thank you letter to donors.

Holiday & Inclement Weather Plans

What actions are taken to effectively shut down the facility for an extended holiday? What is the plan for closing down for a level 3 emergency?

Questions to consider:

- How do you notify the public that you will not be operational?
- What needs turned off or stored?
- Who is on call for fire/security alarms while the pantry is closed?



Emergency Plan, *Resources*

What resources are close to your facility that can aid in a disaster or emergency?

Resources	Name	Address	Phone
Rent a generator			
Buy dry Ice			
Hospital			
Fire station			
Police station			

Are these items easily accessible?

- First Aid Kit
- Flashlights & batteries
- Tools for shutting off gas/water valves
- Fire extinguisher

Emergency Plan, *Staff*

It is vital that staff, as well as volunteers are trained on how to handle disasters and basic emergencies. Key staff should be assigned emergency circumstance tasks. The chart below may help with identifying fundamental personnel. Assigning responsibilities like this can be useful even in minor emergencies such as extended power outages.

Position for staff or volunteers	Description of responsibilities	Who carries out responsibilities?
Strategic Incident Organizer	Leads the overall response effort, organizes relief effort plan	Manager
Operations Workforce	Directs the carrying out of initial responsibilities, and does initial work , may delegate additional needs to other available staff/volunteers	
Resource Acquirement Specialist	Responsible for obtaining resources for continued functionality of the organization, and to ensure safety	
Finance Supervisor	Tracking activities and costs, overseeing documentation of all disaster related expenses for insurance purposes. May take photos of property damage.	
Information Communication Expert	Keeps all outside resources, such as the supervising organization, aligned with updates and information about the situation at hand.	

If your organization does not already have a disaster preparedness plan, consider developing safety procedures and include a comprehensive approach for dealing with various emergencies.

Emergency Plan, *Clients*

Evaluate the total number of clients that could be at your site in the case of a disaster. Is there sufficient space to house clients? If not, what is the backup plan?

Questions to Consider:

- Without access to transportation, how many clients would have to stay at the facility?
- Are there clients who could need assistance evacuating the facility?

What is needed in order to continue providing services after a disaster?

Questions to Consider:

- What primary service can you continue to provide?
- What critical resources do you need to maintain operation?
- Which neighboring agencies can you share resources with, or refer clients to for services?

Volunteer Management



Most nonprofits rely on the help of volunteers to keep their organization running efficiently. Many pantries could not operate without the wonderful group of volunteers that dedicate their time and energy to support the mission of the organization. In order to maintain a group of dedicated volunteers and positive continuous relationships see that volunteers are well managed, expertly trained, respected, and always appreciated.

Food Pantry Volunteer Agreement Confidentiality & Release from Liability



I, _____ agree to work as a volunteer for **[Organization's Name]**. I understand that I will have access to certain sensitive information about the clients served which may include financial, medical, insurance, health, living situation, and other sensitive and confidential records. I agree to keep all information confidential, and will not disclose information pertaining to any client, for any reason other than to serve the client as violations will result in civil liability for breaching a client's rights to privacy. I acknowledge my obligation to respect the client's privacy and the confidentiality of the information pertaining to the client.

As a volunteer I am aware that my participation may require physical activity (i.e. standing, lifting and carrying up to 40 pounds) and will require the use of reasonable caution to avoid injury. I am voluntarily participating in this activity with knowledge of the hazards and potential dangers involved, and agree to accept any and all risks of personal injury and property damage.

I understand that the tools and materials provided by **[Organization's Name]** are and remain the property of **[Organization's Name]**, and I agree to return these tools and any remaining materials to **[Organization's Name]** at the end of my volunteer service.

I HAVE CAREFULLY READ THIS AGREEMENT AND FULLY UNDERSTAND ITS CONTENTS.

Signature: _____

Date: _____

If you don't already have one, **consider putting together a volunteer manual and training packet.** Here is a sample volunteer agreement letter that outlines expectations and release of liability.

Recruiting Volunteers

Volunteer relationships are mutually beneficial. Although most organizations appreciate a stable group of experienced core volunteers, single instances of service can also be valuable to the organization. Anyone can be a volunteer, and all skillsets should be respected. You may never know how allowing someone to be a part of the work you do, will affect them in the future. Also, creating group opportunities can be a great way to get larger projects done, while incorporating team building activities and strengthening relationships.

Where do you normally recruit volunteers? How?

Places to find volunteers:

- Clients of the food pantry
- Local intramural sports teams
- Churches & other religious institutions
- Youth groups
- High school & college students, including staff & faculty
- Volunteer fairs, or even job fairs
- Young Professional Associations
- Civic/Fraternal Organizations

Services like, *Constant Contact*, are online resources that will allow you to stay in touch with volunteers, donors, board members, and the community.

Does your organization have a formalized way of communicating with volunteers? Have you considered utilizing online volunteer mobilization resources such as Volunteer Match or other sites that connect volunteers to nonprofits? What about social media like Twitter or Facebook? There are many benefits to using social media to find volunteers for your program. Being a part of a social network not only connects you to volunteers and funders, but also makes you a visible part of the community.



Training Volunteers, *Responsibilities*

All pantries want to provide the opportunity for volunteers to undertake a results-driven service opportunity, especially one designed to meet the food access and hunger relief needs of the residents they serve. In doing this, volunteers can see how their work supports food distribution to hungry families through their work at the pantry. **Remember to include civil rights training as part of your overall education process.**

Volunteer Positions	Description of Responsibilities	How To Implement Training
Front Desk	Greet families and check clients in, fill out eligibility forms, inspect identification, file forms, assign numbers to waiting families, schedule appointments	
Shelf Stocker	Help unload truck or pallets, moving product from stock area to shelves and coolers, organizing the storage area, keep storage area and pantry clean	
Shopping Assistant	Escort families through the pantry while helping them make selections of various food items, enforce compliance of the amount of food received for household size, may need to load carts and help elderly/disabled clients to vehicle	
Box Packer	Fill emergency boxes with non-perishable items in specified quantities, assist shelf stocking team when needed, help keep stock area and pantry area clean	

Important points to consider when training volunteers:

- Model good customer service; ensure all families are treated with respect.
- Make sure volunteers understand the check-in and check-out process. Clearly communicate the number of visits a family can come in to receive food each month, how to schedule appointments, and whether walk-ins are allowed.
- Give guidelines of how the shopping process occurs.

Volunteer Code of Conduct

With all of the wonderful work volunteers do, you may not think that a volunteer code of conduct is entirely essential. Implementing standards for responsibly carrying out assigned duties, and outlining expectations may actually be beneficial. Construct a system that identifies violations, accompanied by clear consequences. This can also be used as an opportunity to discuss the organization’s formal grievance policy.

Our Policies:

How we address violations:

Adhere to family size distribution guidelines.

Volunteer will be reminded of guidelines; further action will result in a transfer from shopping assistant to an alternate position.

Questions to Consider:

- Do you have set practices or policies in place that address missed volunteer shifts?
- Is there a dress code (must wear nametags, or closed toe shoes)?
- When are rest breaks?
- What are the stipulations for volunteers shopping at the party (should they be accompanied)?
- Can volunteers be terminated? If so what is the dismissal procedure?

Tracking Volunteer Hours

There are a variety of reasons to keep an account of all of the hours volunteers contribute to the success of your organization. Some may be students that need to satisfy an educational obligation. Others may need to fulfill community service requirements, whether court ordered, or through an employer. No matter the circumstance the hours should be tracked so that you have an accurate account for both the volunteer and your organization. You may want to have them sign in and out of each shift.

Volunteer Name	Week 1	Week 2	Week 3	Week 4	Total Hours For January 2013
<i>Example:</i> Ashley Smith	4 Hours	None	5 hours	None	9 Hours
Total Volunteer Hours					

You may need to make your chart more specific. For larger organizations with a lot of volunteers may need a more sophisticated database to track hours; some online resources such as *Volunteer Hub* have a service to help you do just that.

Volunteer Appreciation

It is clear that volunteers serve a special purpose when it comes to the functionality of food pantries. Why not express how much they are appreciated? Have a gathering or write a newsletter; you can list how volunteers have helped the organization to reach goals, recognize all of the work they have achieved, and explain why they are important to the community you serve. This also improves volunteer retention!

How does your organization strive to show volunteers they are appreciated?

Can volunteers evaluate their experience with your organization?

Volunteer appreciation should start even before volunteers show up for their shift. A welcome letter can really make new volunteers feel well received into the organization, and should stress the importance of volunteers in fulfilling the mission of the organization.

Example: Volunteer Welcome Letter

Dear Volunteer,

Thank you for choosing to volunteer with *Our Organization*. We are thrilled to welcome you to our team of volunteers. We believe volunteers are a vital part of supporting the mission of this organization. We hope that you find the responsibilities of your volunteer duties to be fulfilling, and that your experience with us is quite rewarding.

If you have any questions, please feel free to contact us at XXX-XXX-XXXX

Sincerely,
The Food Pantry

Finances & Budgets

Effective management of finances can be crucial to organizational success. It can outline the major costs and give an overview of available resources. Donors also find it useful when tracking their contributions to see how their funds are being utilized. Having a comprehensive budget can establish credibility with your donors, and provide a clear view of goals that can be set for the following year.

Many organizations will require the budget to be approved by The Board of Directors before the beginning of the fiscal year. **Who approves and maintains your budget?**

Annual Budget

Why is having an annual budget important?



- It shows realistically what you can afford and where gaps lie in funding, which might help with making tough decisions about what programs to cut or expand.
- It affords you the opportunity to plan to meet needs, and to decide what you're actually able to accomplish in a fiscal year concerning current and future endeavors
- A budget can motivate you to be creative in seeking out other sources of funding.
- It facilitates discussion of the financial status of the organization.
- It helps you avoid surprises and maintain financial control, which can help you gauge current annual income and set goals for annual increases in funds raised.

Annual Budget, Assessing Financial Responsibilities

Budgets must be drawn to cover your fiscal year, and should be ready before the beginning of each fiscal year. While any budget should be easily understood, the amount of information needed may vary by organization. Set reasonable projections of financial need, and account for any programs that may be introduced during the fiscal year.

This table can be used to project annual need. You can incorporate information to help you plan or create a budget for the upcoming fiscal year. Show which funds are allocated, and which funds will be deducted from the amount of money you currently have available.

Annual Financial Needs *Fiscal year 2014	Financial Resources	Projected Dollar Amount Required	Current Amount Allotted	Amount We Need to Raise/Secure
Food				
Paid staff				
Facility Rent	Church, government grant, private donation	\$26,400/year	\$2,200/month	\$0
Facility Utilities				
Office supplies				
Miscellaneous				
New Programs				

Bookkeeping



Implement an accounting system for your program that is easy to use and understand. If your agency has a computer, you may want to consider using a simple accounting program, such as QuickBooks or Microsoft Excel. Having your budget on the computer will make it easier to generate reports for yourself and donors.

If your organization does not have access to a computer, you can set up a manual bookkeeping system. You just need to keep an accurate account of the amount of money that comes in and out of your program.

Basic bookkeeping is quite similar to maintaining a personal checkbook. It is simply the recording of financial transactions including purchases, receipts, and monetary donations.

Date	Check #	Memo	Check Amt.	Deposit Amt.	Balance

Fundraisers & Food Drives



Feeding hungry people is a priority; some organizations may find it difficult to do this with a limited budget. A lack of financial resources can sometimes stifle organizational growth. You may need to host fundraisers or food drives to keep your program running. Fundraisers and food drives can be fun, and will engage the community in your mission.

What types of fundraisers or food drives do you host?

Type Of Campaign	Date/Duration Of Campaign	Location Of Campaign	Contact At Collection Site	Person In Charge Of Collection	Amount Raised This Year
Food Drive					
Fundraiser					

You may need to make a more elaborate chart to detail your food drives and fundraisers. Be sure to secure a collection method or provide materials for food drive host sites, such as boxes to collect all of the food. You may want to initiate friendly competition to drive up quantities. Remember almost anyone can give something to help out another person in need, make it as easy as possible for people to participate and donate.

Grant & Proposal Writing



Identifying your audience and applying for grants that support your specific mission can really improve your chances of receiving a grant. Having accurate documentation of your program and the people you help will be a part of your application, always have this information available!

Remember when writing a grant you want to paint a picture of all the great work your organization has accomplished, and what the grant will mean to the people you serve as you have continued success alleviating hunger.

Most grant and proposal applications clearly state what information must be submitted to be eligible for funding. Below is an outline of general information most donors request.



The government, religious sources, and private or corporate foundations usually have grants available. Before you apply, make sure your program fits the funder's guidelines.

Maintaining a professional relationship with funders will aid in your success of securing future grants. **Does your organization depend on or apply for certain grants annually? If so, which ones?**

PLAN: Pantries Learning to Assess Needs

Most clients of emergency food programs usually need much more than food. What other services does your program offer? Do you offer financial counseling or job training opportunities? Do you use other providers to expand your services, or do you provide referrals?

Questions to consider:

Who is in charge of each external program, or who is the main contact?

What is the training process if the program is offered through pantry staff?

Public Benefits

The following lists *some of the most important programs* that your clients should know about, both food related and beyond. Some of the services can even be accessed through the Ohio Benefit Bank!

Program	Description of Service
SNAP Supplemental Nutrition Assistance Program	Formerly the food stamp program, SNAP provides a monthly stipend for food on an EBT (Electronic Benefit Transfer) card. SNAP is intended to supplement users' food budgets, encourage clients to come to the pantry before using up their SNAP benefits to stretch their SNAP dollars.
WIC Women, Infants and Children	Provides healthy foods, nutrition information and referrals to health and social services to pregnant, breastfeeding, and non-breastfeeding postpartum women, and to infants and children up to age five.
CSFP Commodity Supplemental Food Program	Provides monthly food and assistance to participants 60 years of age and older.
Free/Reduced School Lunch	Students from low income households qualify for free or reduced-price school lunch. SNAP participants automatically qualify for free school meals.
Summer Meal Program	Provides meals for children over the summer vacation
HEAP Home Energy Assistance Program	Pays part of winter energy bills for low-income renters and homeowners.
Medicaid	Pays for medical care for some low-income and medically needy people.
TANF Temporary Assistance for Needy Families	Provides temporary cash assistance to needy families with minor dependent children.
Housing Assistance	Provides subsidized rents, public housing and homeowner education and assistance.
Free Tax Filing	Provides free tax preparation services
Domestic Violence shelters	Provides emergency housing and counseling to victims of domestic violence.
Title XX	Child Care Assistance

Identifying Client Needs



Serving each client with dignity and respect is a standard right that every client should experience. All clients should be treated fairly and equally when entering your establishment, and when distributing goods to each household. Clients should be assured that their information is always kept confidential.

If you have many clients that speak little to no English, try offering information in their native language. Think about having someone on staff or a volunteer that can communicate with clients with limited English skills. If you serve a largely ethnic population consider ordering more food that is appealing to those clients, try keeping cultural sensitivities and differences in mind when serving all clients.



Some clients may have special diets due to health or religion; some may have limited literacy or limited mobility. Other clients may have vision, or hearing disabilities. Consider training volunteers, or having materials to accommodate these specific needs.

What policies do you have in place that protect client's rights and privacy?

Question to Consider?

Do you have someone that conducts outreach to offer services or resources to eligible people beyond the clients that walk through your doors?

Staying Committed To Your Organization

When you are feeling mentally, physically, or emotionally exhausted it can be difficult to ensure high quality service for those who depend on you. Staying positive and encouraging staff to be positive when encountering so much despair on a regular basis can be hard. Try planning occasional staff and volunteer events to relieve stress and strengthen relationships. Attempt to restrain judgment of clients; you never know what situation caused them to come into your pantry. Sometimes reaching out to clients can help you to offer resources that can help them out of a bad situation.



What do you do to keep a positive work environment?

Nutrition Education

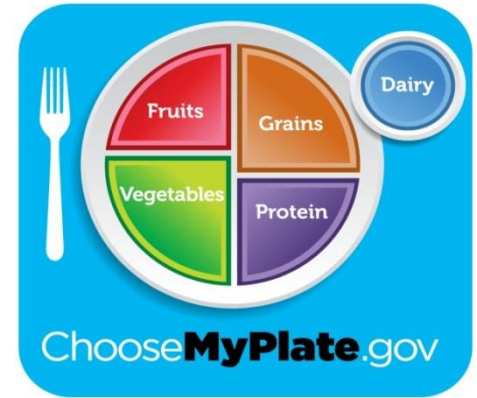


There here are many health concerns associated with food insecurity. Some food insecure people may find it more convenient to purchase high calorie, low-nutrient foods. Healthy food choices are not always obvious. Choosing high calorie, low nutrient foods can contribute to various conditions such as diabetes, heart disease, stroke, and some cancers.

Do you hold any type of nutrition education classes, or give out nutrition related information or recipes?

Nutrition Education, *My Plate*

My Plate by the USDA is one way to encourage people to eat well-balanced meals. The My Plate concept shows proper proportions of food from each food group. For example, half of every plate should contain fruits and vegetables. Offering a lot of fruits and vegetables in your pantry, along with displaying the My Plate graphic can inspire people to eat healthier. When shopping, encourage people to choose whole grains. Explain how replacing sugary beverages with water can be an extremely valuable part of better health.



Do you see sweets or an area for fatty foods on the My Plate graphic? They are omitted because they should not be a part of every meal.

Stocking Shelves & Offering Healthy Choices

Highlighting “Healthy Options” by accenting your shelves can help people see better food choices. What steps can you take to offer more healthy options to your clients?

Food Group	Healthy Options	How We Offer More Healthy Choices:
Fruit	Fresh fruit is great, but if you only have access to canned try to find options with light syrup.	
Vegetables	Look for fresh vegetables or low sodium canned vegetables	
Grains	Whole grains are the best option. Try offering more whole grain pasta and bread.	
Protein	Whether it is a canned protein option or meat find low fat, low sodium options.	
Dairy	Shelf stable 1% milk or non-fat dry milk is always a great choice; try to find more low fat dairy products to offer.	

Addressing Clients with Specific Dietary Restrictions

If many of your clients have diabetes, add more whole grain and high fiber foods to your inventory and decrease the amount of refined grains and sugars. To accommodate special religious dietary restrictions survey clients to see if you need to offer more food that encompasses their needs.

How do you make sure the dietary restrictions of your clients are met?

Are most of your clients elderly, or mainly children?

How do you choose items that will serve that population?

Community Garden

A garden is a great way to expand resources, offer healthy food, and engage the community. If you have a community garden describe your process for planting each year and detail your garden plan.

Season	Month	Type of Seed Planted	Lbs. of Food Produced
Spring			
Summer			
Fall			



Appendix

Legal and Tax Information

Food Pantry's Legal Name	
Federal Tax ID Number	
Sponsor Agency's Name & Federal Tax ID Number	

Staff Directory & Important Contacts

Title/Company	Name/Department	Phone/Email
Program Director		
Pantry Coordinator		
Mid-Ohio Foodbank		
Mechanic		
Pest Control Company		
Liability Insurance Carrier		
Bank		
Volunteer		

Appendix

Board of Directors

Board Member's Name	Title/Affiliation	Email Address

Donor Thank You Letter, *Sample*

By law, you must acknowledge in writing all gifts over \$250, but every donation should be acknowledged with gratitude. It is best if each letter has a personal message of appreciation included!

Dear *Donor*,

Thank you so much for your generous gift to help with our mission. We are dedicated to feeding hungry people in our community and truly appreciate your efforts to assist us in turning dollars into nourishing meals. Our food pantry is a 501 (c) 3 approved organization, and your contribution is tax-deductible to the full extent allowed by the law.

Please note that no goods or services were rendered in exchange for this contribution.

Thank you,

Your Local Community Food Pantry

Appendix

Sample Monthly Cleaning Checklist

Cleaning Duties	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Wipe Down Shelves												
Wash All Windows												
Clean Refrigerator												
Defrost Freezer												
Clean Floors												

USDA Shelf Life Reference Guide

Product	Estimated Shelf Life	When to Discard
Baby Food	Use by expiration date	Broken seal, expired
Bread/Bakery items	3-10 Days	Visible mold, package defect
Cans/Bottles	1-several years	Bulging, severe dents
Cereal	6 months-2 years	Stale, infestation
Crackers	1-2 years	Stale, infestation
Dry Beans	1-2 years	Infestation, mold, open
Freezer items	3 months-1 year	Freezer burn, malodorous, previously thawed
Prepared Salad/Dips	Use by date	Past date
Refrigerated Juices	1-4 weeks	Mold, discoloration
Rice	1 year	Infestation, mold, open
Yogurt	1-3 weeks	Mold, open, malodourous

Appendix

Food Quality & Expiration Guidelines

Date Code	Description of Code
Expiration Date	The date past which a product, such as food or medicine, must be sold or removed from availability because it is no longer expected to be fresh or effective.
Sell by	Tells the store how long to display the product for sale. Retailers rotate stock to be sure they sell the oldest first. The consumer can add days to this before eating it.
Best by	The product is at its highest quality, is freshest and tastiest by this date. The “Best when used by” date is not a purchase or safety date. Most people would notice no difference after the date is passed.
Use by	This is the last date for use of the product at peak quality. This date has been determined by the manufacturer of the product.
Production Date	Tells you when the product was produced. It does not tell you anything about the quality or safety of the product, as it does not tell you anything about shelf life. Production dates are used to track product, they are not meant for the consumer.

Succession Plan

Description of Duty	Person Currently Responsible for Task	Person That Will Take Over Responsibilities

Who would carry out the responsibilities of running the pantry if you were to retire, get sick, or had to relocate? A succession plan can give clear direction to staff and volunteers concerning who will take over each responsibility in the event of leadership change, or if unexpected situations occur.