



## **Three-Year Strategic Plan**

**July 1, 2025, to June 30, 2028**

Approved March 19, 2025



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## Executive Summary

This report outlines the strategic framework and operational priorities for Berkshire Bounty (BB).

Using the process described below, the BB Board and staff, with facilitative support, have outlined a strategic framework to enhance its mission-driven impact through work in five key areas. These are:

1. **Philosophy and Values** – The organization will revisit and refine its vision, values, and mission to provide clarity and direction. Additionally, it will examine its past, current and ideal mission orientation along three key dimensions: charity vs. social justice, direct vs. indirect service, and micro vs. macro-level impact.
2. **Marketing** – With consultant support, the Board and staff of Berkshire Bounty will develop and implement a *Strategic Marketing Plan* to increase visibility, strengthen communication with donors, volunteers, and partners, and articulate a compelling case for support.
3. **Fundraising** – With consultant support, the Board and staff of Berkshire Bounty will develop and implement a *Strategic Development Plan*. This structured plan will identify optimal funding sources, evaluate necessary resources, and mitigate potential financial threats such as policy shifts and economic downturns. The Board's role in fundraising will be clarified, along with the approach it will use to secure financial support.
4. **Strategic Growth** – Berkshire Bounty will set goals and metrics for sustainable growth related to revenue, staffing, programming, and overall impact. Decision-making criteria will be developed and utilized to evaluate current and future programs based on cost-benefit analysis and mission alignment.
5. **Physical and Policy Infrastructure** – Berkshire Bounty will assess its physical assets and organizational policies to identify areas for greater efficiency, effectiveness, and alignment with best practices.

This strategic plan, supported by an implementation timeline and responsibilities matrix, offers a clear and achievable roadmap for achieving BB's goals while remaining flexible to community and organizational needs.

## Planning Process

### Summary of the Berkshire Bounty Strategic Planning Process

Over the past six months, Berkshire Bounty undertook a strategic planning process guided by three key questions: Where had the organization been? Where is it currently? And where should it go in the years to come?

The process began with an in-depth assessment of past accomplishments, challenges, and trends by the consultant(s). This evaluation incorporated insights from internal documents, financial reports, and structured engagements with key stakeholders, including the Board of Directors, the Executive Director, staff, volunteers, and community partners, including one-on-one interviews with board members and two online focus groups with volunteers and organizational partners.

Core takeaways from this assessment were captured in an *Initial Learnings Report* (appendix, page 16), that was presented to the Berkshire Bounty Board and staff at a special *Board/Staff Retreat* on September 24, 2024. At this time, the group also reviewed the organization's prior strategic plan and its successful implementation of the report's recommendations (appendix, page 31).

Building on the initial assessment, the organization, with facilitative support, conducted a SWOT analysis to evaluate internal capabilities and external challenges, particularly in the evolving landscape of food insecurity in Berkshire County. Key areas of focus included program offerings, geographic reach, staffing structure, financial sustainability, and overall impact (appendix, page 21).

A subgroup of the Board and staff met in December 2024 and January 2025 to begin crafting and prioritizing Strategic Action Steps that would advance goals identified during the retreat. This included prioritization based on four dimensions: *overall importance*, *achievability* (low hanging fruit), *cost*, and *sequence of implementation*. The subsequent framework serves as the basis for this report.

The final phase of this process was discussion and acceptance of the plan by the Board of Directors at its March, 19 2025 meeting. Following the approval of this plan, and prior to July 1, 2025, the Executive Director, with support from key staff, board members, and/or consultants, will develop clear work plans for each strategic action. These will drive implementation and further clarify timing, responsibilities, resources required, ongoing evaluation, and operationalization.

We believe that this inclusive and iterative process has worked to position the organization for sustainable growth and impactful service delivery over the next three years.

## Strategic Framework

### Berkshire Bounty

- I- **Strategic Priority 1: Philosophy and Values** – The Berkshire Bounty Board of Directors and staff will revisit, refresh, and redefine its vision, values, mission, and mission orientation to offer great clarity and direction both within the organization and in relation to external stakeholders. **Early Year-One.**

A- **Action Step 1.1:** Convene and engage in a facilitated process to **review, refresh and approve its core organizational statements**, namely, its:

1. Vision
2. Values
3. Mission

B- **Action Step 1.2:** Convene a facilitated process that will **explore and define BB's past, current, and optimal mission orientations**, (i.e. the philosophy and assumptions that underly Berkshire Bounty's approach to carrying out its mission), along three key dimensions:

1. *Mission Philosophy* (see appendix A. for definition and graphic representation)
  - Charity
  - Social Justice
  - Community Mobilization
2. *Service Provision Orientation* (see appendix B. for definition and graphic representation)
  - Direct Service
  - Indirect Service
3. *Organizational "Altitude" Orientation* (see appendix C. for definition and graphic representation)
  - Micro
  - Macro

II- **Strategic Priority 2: Marketing** - Create and formalize a board approved **Strategic Marketing Plan** for raising BB's visibility, clarifying its mission, and building a compelling case for support. **Years One and Two.**

**A- Action Step 2.1: Develop "Our Story"**

**B- Action Step 2.2: Develop and hone BB's case for support.**

**C- Action Step 2.3: Strengthen External Communication**

1. Communication with Potential Donors
2. Communication with Potential Volunteers
3. Communication with Partners (e.g.):
  1. Farmers
  2. Pantries
  3. Food System
  4. Other Stakeholders

1.

III- **Strategic Priority 3: Fundraising** - Create and formalize a board approved **Strategic Development Plan** for pursuing and securing revenue to fuel BB's mission. **Mid Year One**

**A- Action Step 3.1: Identify sources and optimal balance (e.g.):**

1. Government Grants
2. Foundation Grants
3. Corporate Support
4. Individual Donors
5. Major Donors
6. Earned Revenue

**B- Action Step 3.2: Evaluate resources required**

**C- Action Step 3.3: Identify development threats** to watch out for and/or mitigate (e.g.):

1. Federal Policy Shifts Under the New Federal Administration
2. Funder/Foundation Reprioritization
3. Changes in Food Cost or Availability
4. Competition with Other CBOs (Community Based Orgs.)
5. Economic Downturn

**D- Action Step 3.4: Clarify and codify the role of BB Board** members (collectively, individually, and/or in subcommittees) within the development strategy.

**E- Action Step 3.5: Package our story** to advance development priorities.

**IV- [Strategic Priority 4: Strategic Growth](#)** - Explore and Define goals for deliberate growth and sustainability. Set goals and objectives accordingly. **Year Two**

**A- Determine metrics for assessing growth, e.g. growth in:**

1. Revenue
2. Staffing
3. Programming
4. Impact

**B- Action Step 4.1: Develop criteria for assessing current and future programming** with likely considerations to include:

1. Cost/Benefit
2. Opportunity Costs
3. Mission Impact
4. Administrative Effort Required

**C- Action Step 4.4: Assess Human Assets**

1. Assess staffing needs, capacity, challenges, and focus, including budget implications
2. Assess volunteer needs, capacity, challenges, and focus
  - Develop a volunteer management plan, including budget implications
3. Assess and codify Board member roles (collectively and individually)
4. Catalog and assess stakeholder relationships and their respective values

**V- [Strategic Priority 6: Physical and Policy Infrastructure](#)** - **Review BB's current physical infrastructure and organizational policies**, so as to clarify infrastructural needs and identify areas for additional policy development/refinement. **Years Two and Three**

**A- Action Step 6.1: Assess adequacy of current physical infrastructure**

**B- Action Step 6.2: Catalog current organizational policies** and contrast with identified best practices in the field.

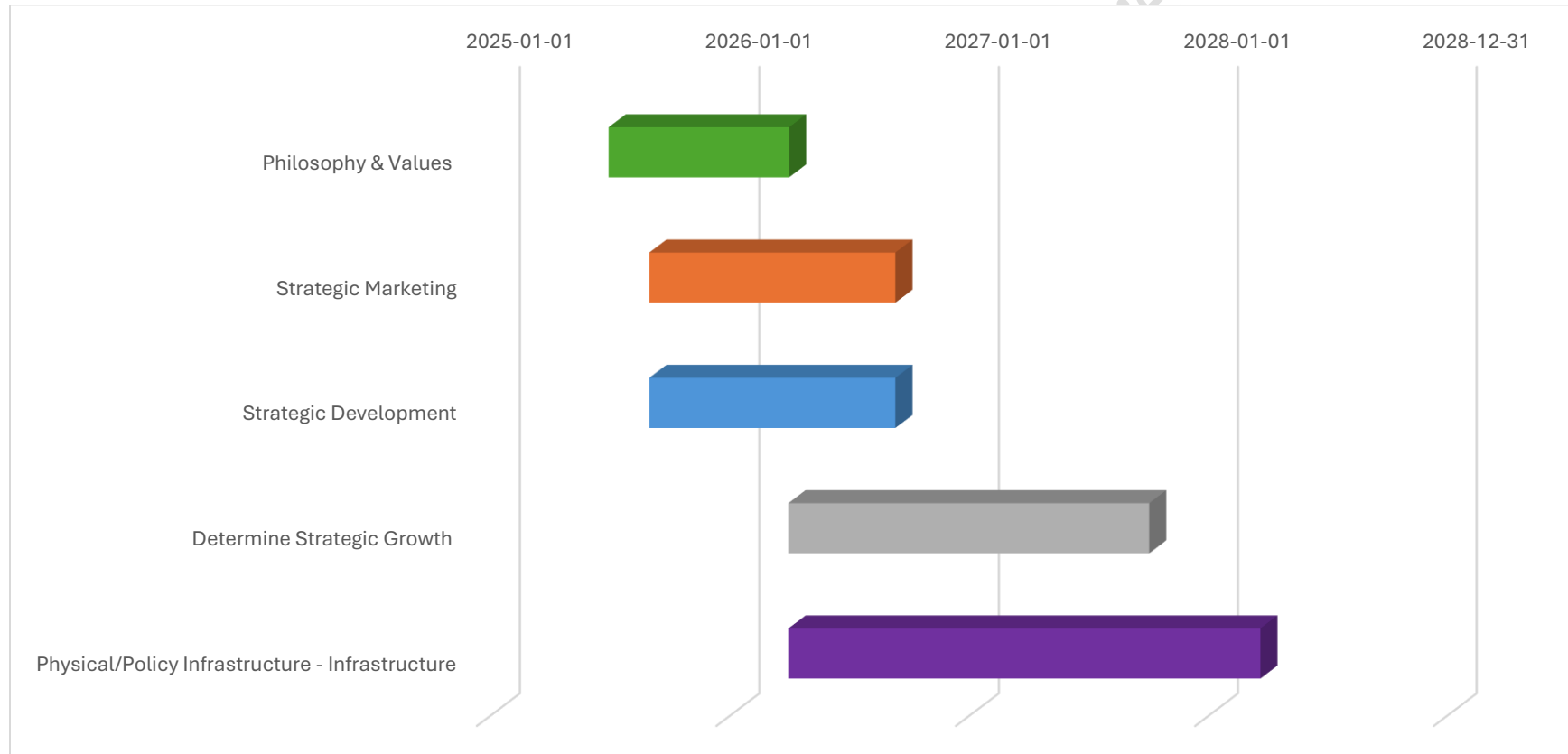
**C- Action Step 6.3: Identify a plan/timeline** for addressing any infrastructural and/or policy needs.

#### **Additional Recommendation:**

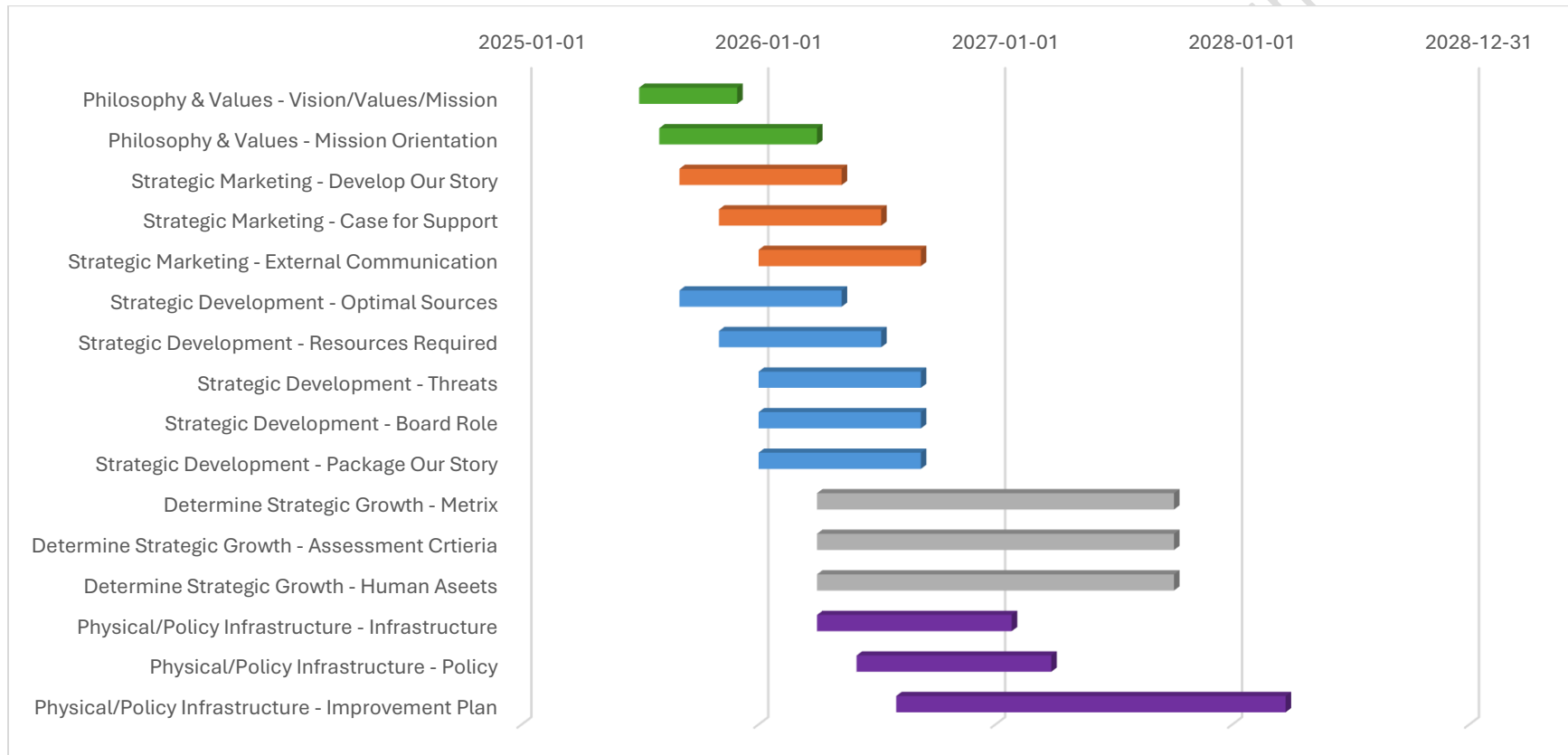
Explore and implement the creation of a Board Subcommittee structure to improve Board efficiencies moving forward and allow for greater confidentiality (HR) when needed. Consider the creation of *Finance*, *Governance*, and *HR Committees* to begin with.

## Implementation Timeline:

### Summary Timeline:



## Detailed Timeline:



| Task                                                                    | Start      | End      | Decision | Accountability | Responsibility     | Consulted     | Informed          |
|-------------------------------------------------------------------------|------------|----------|----------|----------------|--------------------|---------------|-------------------|
| <b>Philosophy &amp; Values -</b>                                        |            |          |          |                |                    |               |                   |
| Vision/Values/Mission                                                   | 2025-07-01 | 6/1/2025 | Board    | Chair          | Consultant - JA    | Staff         | Partners          |
| Mission Orientation                                                     | 2025-08-01 | 9/1/2025 | Board/ED | Chair          | Consultant - JA    | Staff         | Partners          |
| <b>Strategic Marketing -</b>                                            |            |          |          |                |                    |               |                   |
| Develop Our Story                                                       | 2025-09-01 | 9/1/2026 | Board/ED | Chair          | Marketing Consult. | Staff         | Partners          |
| Case for Support                                                        | 2025-11-01 | 9/1/2026 | Board/ED | ED             | Devel. Direct.     | Staff         | Partners          |
| External Communication                                                  | 2026-01-01 | 9/1/2026 | ED       | ED             | Marketing Consult. | Staff         | N/A               |
| <b>Strategic Fund Development</b>                                       |            |          |          |                |                    |               |                   |
| Optimal Sources                                                         | 2025-09-01 | 9/1/2026 | Board/ED | Treasurer      | Devel. Director    | Staff         | N/A               |
| Resources Required                                                      | 2025-11-01 | 9/1/2026 | ED       | ED             | Devel. Director    | Staff         | Partners          |
| Threats                                                                 | 2026-01-01 | 9/1/2026 | Board/ED | ED             | Devel. Director    | Staff         | N/A               |
| Board Role                                                              | 2026-01-01 | 9/1/2026 | Board/ED | ED             | Devel. Director    | Staff/Auditor | Policy Handbook   |
| Package Our Story                                                       | 2026-01-01 | 9/1/2026 | ED       | ED             | Devel. Director    | Staff         | N/A               |
| <b>Determine Strategic Growth</b>                                       |            |          |          |                |                    |               |                   |
| Metrix                                                                  | 2026-04-01 | 4/1/2027 | Board/ED | Finance Chair  | Consultant - JA    | Staff         | Finance Committee |
| Assessment Criteria                                                     | 2026-04-01 | 4/1/2027 | Board/ED | Finance Chair  | Consultant - JA    | Staff         | Finance Committee |
| Human Assets                                                            | 2026-04-01 | 4/1/2027 | Board/ED | HR Chair*      | HR Committee*      | Staff         | HR Handbook**     |
| <b>Physical/Policy Infrastructure</b>                                   |            |          |          |                |                    |               |                   |
| Infrastructure                                                          | 2026-04-01 | 4/1/2027 | Board/ED | ED             | Consultant         | Staff         | Policy Handbook   |
| Policy                                                                  | 2026-06-01 | 4/1/2027 | Board/ED | ED             | Consultant         | Staff/Auditor | Policy Handbook   |
| Improvement Plan                                                        | 2026-08-01 | 4/1/2028 | Board    | ED             | Consultant         | Staff         | Policy Handbook   |
| * To be developed as a part of recommended Board subcommittee structure |            |          |          |                |                    |               |                   |
| ** To be created in conjunction with policy development goal above      |            |          |          |                |                    |               |                   |

**Implementation planning:** Following the approval of this plan, and prior to July 1, 2025, the Executive Director, with support from key staff, board members, and/or consultants, will develop clear workplans for each strategic action. These will drive implementation and will further clarify timing, responsibilities, resources required, ongoing evaluation, and operationalization.

**Appendix:**

Shared With Permission From Berkshire Bounty

## Nonprofit Missions Framework

When thinking about mission within nonprofit organizations, there are several dimensions to consider. These include mission orientation, altitude, and degree of direct interaction with clients and community members. Each of these dimensions exist on a spectrum with a balance that is unique to each organization.

As such, groups looking to revisit their mission should not expect to choose one dimension over the others, but rather consider the respective balance that is most appropriate for how it approaches community care, attention to detail, and social impact.

### Mission Orientations

Mission-based organizations (typically nonprofits) likely operate within three primary orientations: *charity*, *community mobilization*, and *social change*. Each contains its own sets of values and assumptions and reflects a distinct approach to addressing societal needs and challenges. Typically, at an organization's founding, one orientation is dominant; however, that is not to say that it has necessarily been chosen explicitly.

1. **Charity Orientation** – The *charity* approach focuses on immediate relief and direct assistance. This orientation often assumes that people are in one of two categories: “in-need” or in a position to offer help (giving, volunteering, etc.). A charity orientation often assumes an obligation of those with the means to help to do so. Organizations with a charity orientation provide essential services such as food, shelter, and medical aid.

#### Pros:

- Good for crisis alleviation
- Helps individuals meet basic needs so that they can focus on higher-order needs
- Easy approach to communicate to donors and volunteers
- Easy to quantify for impact tracking
- Lends itself well to volunteer engagement

#### Cons:

- Can foster client dependency on organization
- Limits ability to focus on and address systemic causes of crises
- Depends on maintenance of inequitable systems (“haves” vs. “have-nots”)
- Reduces motivation for organization to engage in long-term problem-solving for clients because problems continuing to exist = job security
- Addressing the same problem repeatedly is unappealing to many institutional funders

2. *Community Mobilization Orientation* – This *community mobilization* orientation emphasizes engaging and empowering local communities to take collective action toward solving their own problems. It involves participatory approaches, where community members actively contribute to and lead initiatives, such as cooperative projects, self-help groups, and grassroots organizing.

**Pros:**

- Encourages community resilience
- Greater balance in decision-making between organizations and the community members they serve
- Good orientation for consistent, iterative work toward long-term goals
- Deepens relationships for all involved, fostering possibilities for greater collective impact
- On-trend approach that is currently attractive to institutional funders

**Cons:**

- Time intensive for all involved
- Shared power models have not been part of most people's lived experience and may require significant training and acclimation, often over years
- Poses challenges for balancing time commitment, compensation, and decision-making between organizations and external stakeholders
- Often requires building relationships across socioeconomic differences, which is not easy or natural within the structure of our society
- Difficult to communicate impact to donors and to find low-stakes, short-term opportunities for volunteer engagement

3. *Social Change Orientation* – The *social change* orientation, also called a *social justice orientation*, focuses on addressing systemic and historic inequalities. This approach seeks to transform the underlying structures that contribute to social injustices.

Organizations with a social change orientation often advocate for policy reforms, challenge power imbalances, and promote human rights. Similarly, the solutions they employ may be redistributive, require societal reflection, and/or lead to societal culture change. Through activism, education, and legal advocacy, they work toward long-term, structural improvements in society. As with community mobilization, social change work tends to focus on long-term power shifts and institutional practices as opposed to rapid response.

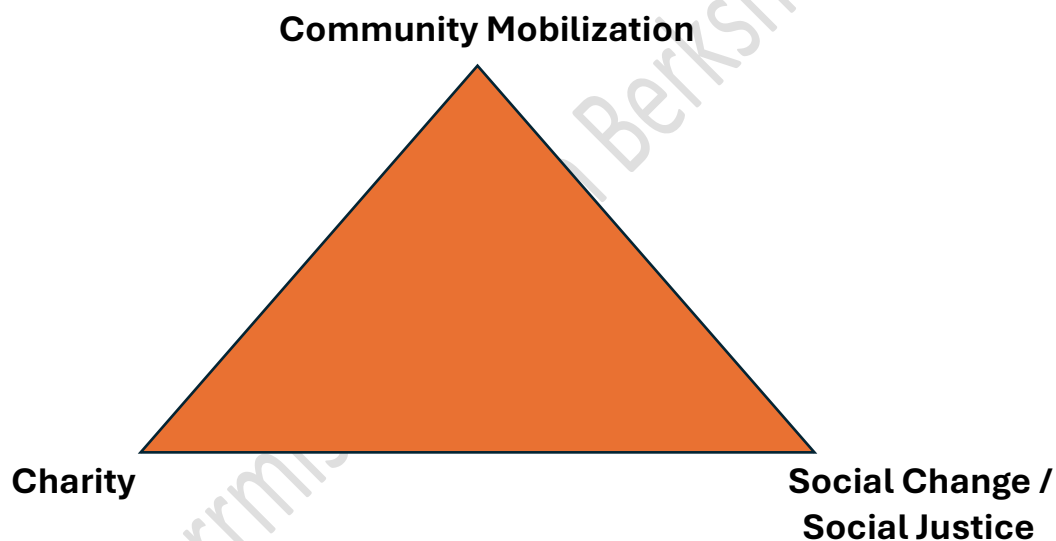
**Pros:**

- Arguably achieves the longest-term and largest-scale impact
- Can be approached through more structured/professionalized work (vs. time-intensive and unpredictable community engagement, crisis response, etc.)
- Appealing to donors who want to see their dollars go beyond short-term relief

**Cons:**

- Work can be expensive with reliance on more credentialed and prestigious roles (lawyers, researchers, lobbyists, etc.)
- Preference for work to be led by those who are the subject of advocacy can pose hiring challenges
- Can be difficult to communicate mission and impact to donors
- Many donors are averse to funding administrative work

While distinct, these orientations often overlap, with many organizations incorporating elements of all three to create a comprehensive impact strategy. And while these orientations may overlap, they represent distinct strategies that shape how mission-driven organizations think, plan, prioritize and pursue their goals



## Direct Verses Indirect Service Orientations:

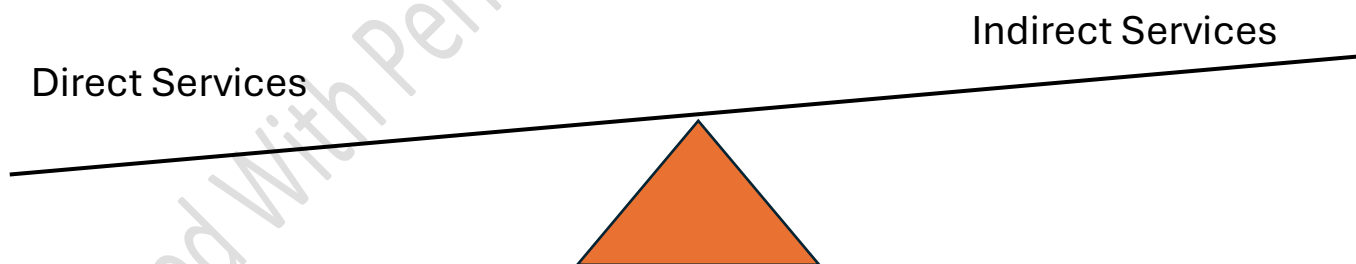
### Direct vs. Indirect Services in Nonprofit Organizations

Nonprofit organizations provide services in two primary ways: directly and indirectly. The primary distinction between these approaches lies in how services reach beneficiaries and the nature of their impact.

**Direct services** involve hands-on, immediate support to individuals or communities. These services address urgent needs and often include food distribution, medical care, housing assistance, education, and counseling. Nonprofits delivering direct services typically interact face-to-face with beneficiaries, ensuring immediate relief and tangible outcomes. Examples include a homeless shelter providing beds for individuals or a health clinic offering free vaccinations.

**Indirect services**, on the other hand, focus on creating broader systemic impact. These services include research, advocacy, policy development, training, and capacity building for other organizations or community leaders. Indirect service nonprofits work behind the scenes to influence social change, strengthen institutions, and improve service delivery. For example, a nonprofit that trains teachers to improve literacy education or an organization lobbying for policy reforms in affordable housing operates through indirect service.

While distinct, both direct and indirect services are crucial in addressing societal issues. Many nonprofits, in fact, integrate both approaches, providing immediate assistance while also working to create long-term, sustainable solutions.



## Organizational “Altitude” Orientation

A nonprofit’s approach to its mission can be understood in terms of **altitude**, with a *micro orientation* operating at ground level and a *macro orientation* taking a higher vantage point.

A *micro-oriented* nonprofit works directly with individuals and communities, addressing immediate needs and localized issues. Like standing at street level, this approach provides a close-up view of challenges, allowing for tailored, hands-on solutions. For example, a food pantry distributing meals or a tutoring program for underserved students operates with a micro perspective. These organizations tend to have a deep understanding of local conditions but may lack a larger societal perspective on services they provide. These organizations, typically, focus on direct service delivery, ensuring immediate impact but often addressing symptoms rather than root causes.

In contrast, a *macro-oriented* nonprofit takes a higher-altitude perspective, looking at systemic factors that shape social issues. From this elevated view, patterns, trends, and structures become clearer, allowing for large-scale interventions. Their geographic focus tends to be region, national or international, as opposed to the local or hyperlocal employed by a micro focused organization. Macro oriented organization might advocate for policy reforms, conduct research, or work on movement-building to influence broad societal change. For instance, rather than feeding individuals, a macro-oriented nonprofit might campaign for legislation to address food insecurity at a structural level or focus on improvements in overall food systems.

Both orientations are vital; while micro-level efforts provide immediate relief, macro-level strategies drive long-term transformation. Many effective nonprofits integrate both perspectives, bridging immediate service with systemic change.

Food Banks / Policy Think-Tanks



Local Food Pantries



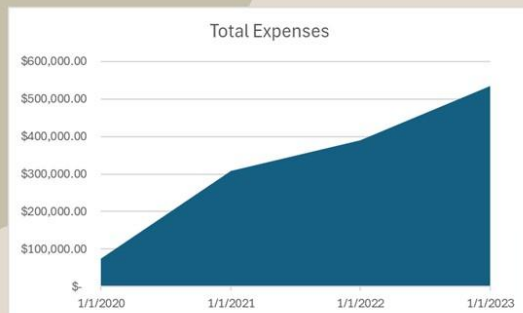
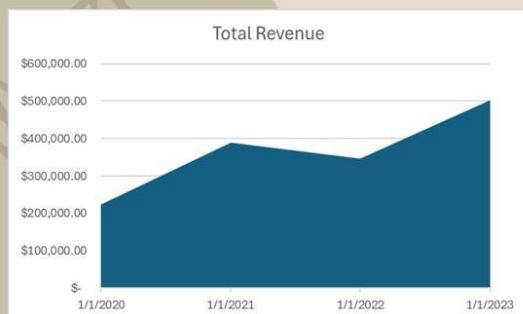


**BERKSHIRE BOUNTY**  
Initial Learnings  
Strategic Planning Process  
Fall 2024

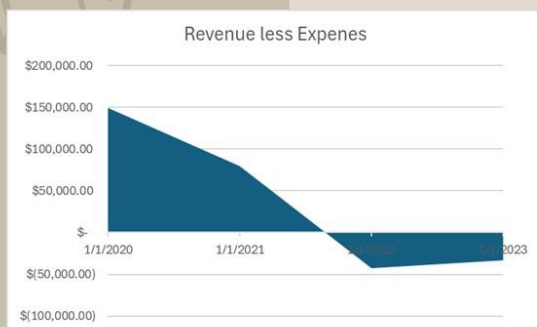


**Financial Trends:**

## Organizational Growth



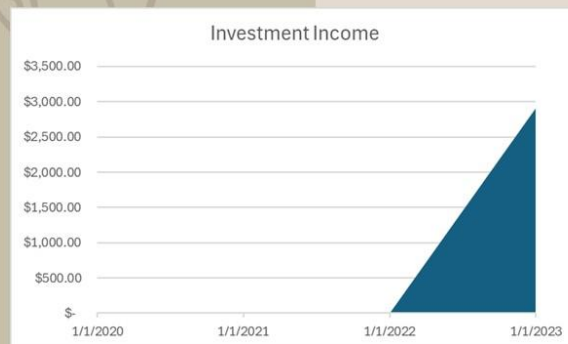
## Profitability Trends



## Asset Trends



## Income Generation Through Investments

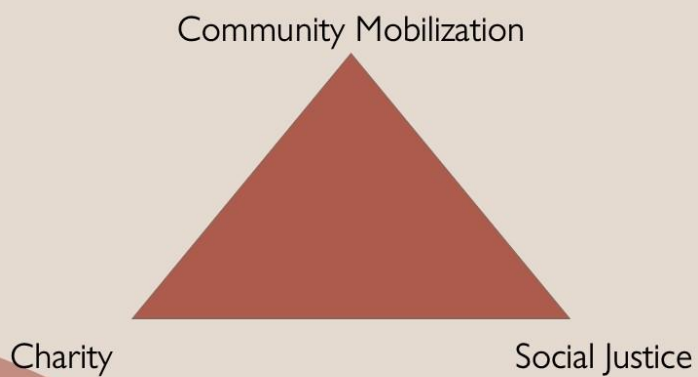


## Marketing, Messaging, and Communication:

1. Communication with Potential Donors
2. Communication with Potential Volunteers
3. Communication with Partners:
  - Farmers
  - Pantries
  - Food System

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## Mission Orientation:



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## Common Themes:

### Metrics For Impact:

What is our yardstick or thermometer?

- ☐ Quantity of Food (pounds distributed/gleaned/procured)
- ☐ Quality of food (fresh, local, healthy)
- ☐ Meals Provided
- ☐ Individuals Served
- ☐ Pantries supported
- ☐ Most marginalized
- ☐ Others?

## Mission Orientation:



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## Sustainability:

- Volunteers
- Savings – Net Assets
- Sources of Ongoing Funding

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## **Stakeholder Engagement:**

### **Stakeholders Engaged - to date**

#### One-On-One Interviews:

- Three Board Members
- Two Berkshire Bounty Staff Members

#### Focus Groups (2):

- Four Partner Organization Representatives
- One Partner Farmer
- Two Berkshire Bounty Volunteers

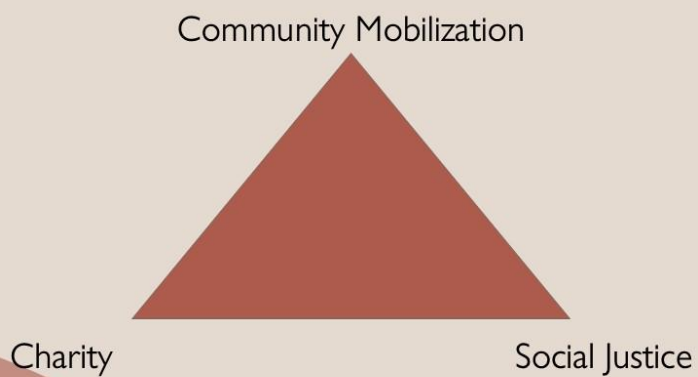
Eleven Individuals in Total

## Marketing, Messaging, and Communication:

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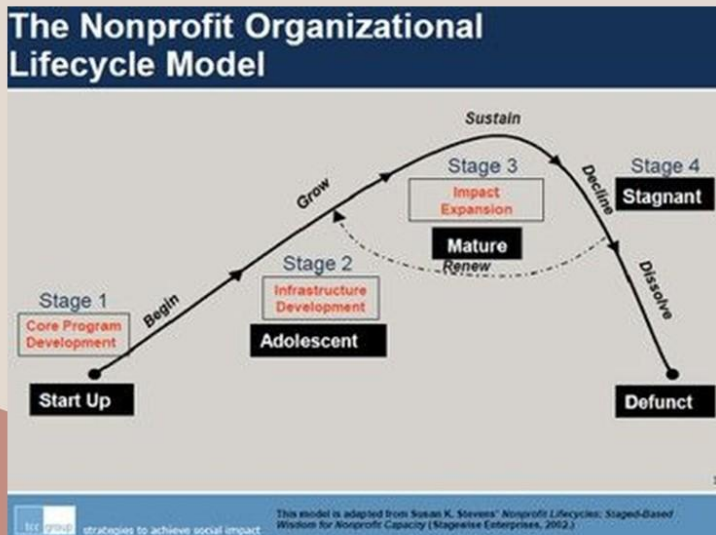
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## Mission Orientation:



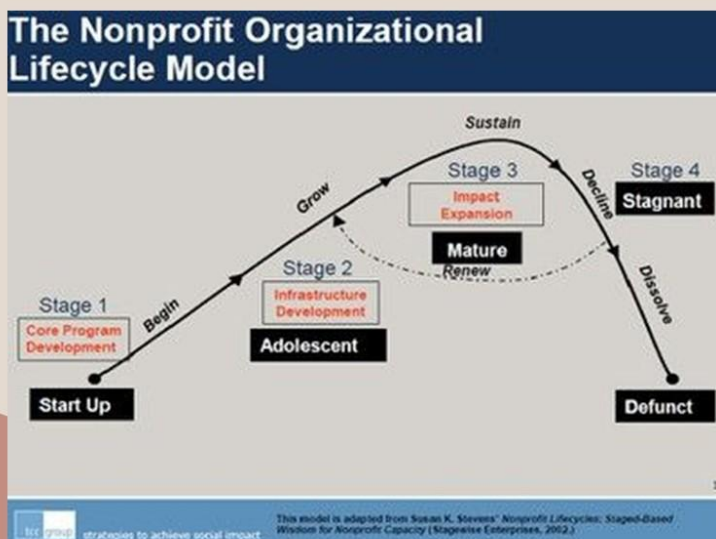
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## Nonprofit Life Cycle: Stages of Development



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## Nonprofit Life Cycle: Stages of Development:



### Evolving Roles:

- Role of Founders
- Professionalization
- Board Structure & Functions

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## Micro-Macro Perspective:

Food Bank of WM and Policy Makers



Berkshire Bounty

Food Pantries



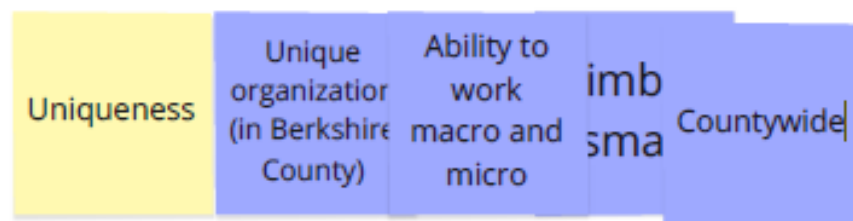
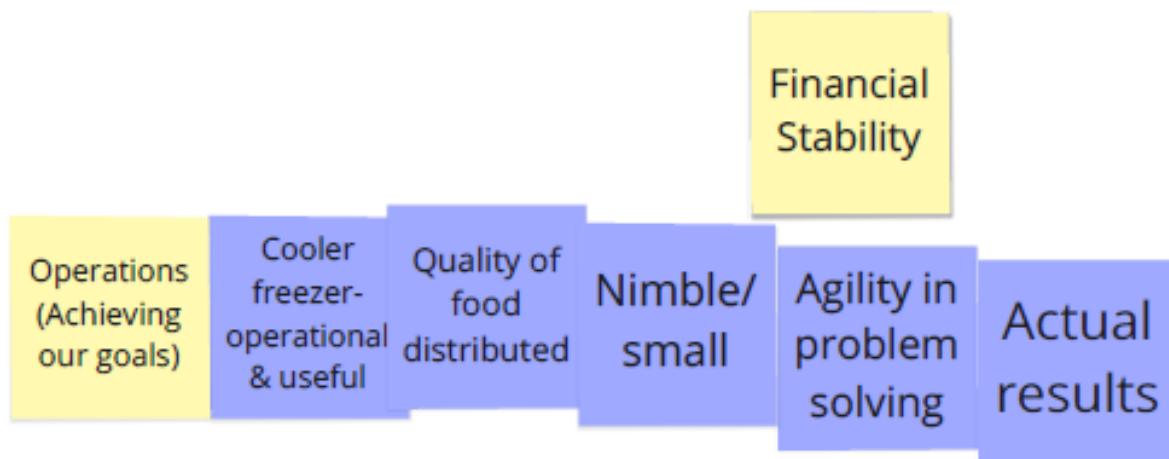
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## Aspirations:

- ☐ Financial Growth
- ☐ Scale
- ☐ Wind Down vs. Longevity
- ☐ Visual Presence
- ☐ Others?
  
- ☐ Ideal / Dream –  
If resources were not a limitation

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## Strengths



## Weaknesses



## Opportunities



## Threats



## **Berkshire Bounty - Prior Vision and Mission**

### **OUR VISION**

Everyone in Berkshire County should have access to sufficient nutritious food.

### **OUR MISSION**

To 1) provide local food distribution organizations with food to mitigate food insecurity in Berkshire County, and 2) educate and raise awareness about the issue of food insecurity.

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## **Berkshire Bounty - Prior Core Values**

### **OUR CORE VALUES**

- We partner with organizations and individuals to better leverage our community's existing resources in order to achieve the greatest impact.
- We value the expertise of the organizations we serve and through their feedback we develop customized programs to meet their specific needs.
- We make evidence-based decisions by regularly consulting our community partners and measuring our results.
- We make every effort to say "yes" to requests for assistance related to food insecurity issues.
- We respect the dignity of all the people we serve and those who serve alongside us.

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## **Prior Strategic Plan : 2021 - 2023**

### **Prior Plan Strategic Goals:**

- 1- Expand our reach into the Berkshire community.
  - Re-start deliveries to distribution organizations that closed due to COVID.
  - Seek out opportunities to expand beyond our current market area in South County and Pittsfield.
  - Partner with Berkshire United Way on additional countywide food distributions.
  - Find a mutually advantageous means to partner with FBWM to expand our reach and the footprint of the FBWM food donor and agency network.
- 2- Expand participation in Mobile Food Drives.

### **Prior Plan Strategic Goals:**

- 3- Evaluate and expand the farm crop pre-purchase program, in partnership with Berkshire Grown.
  - Assess the pilot program and make modifications where necessary.
  - Grow the program by adding farms.
  - Seek additional funding.
- 4- Raise awareness by educating our donors and the general public about the prevalence and consequences of food insecurity in our community.
  - Refine monthly website updates.
  - Upgrade website.
  - Develop an effective social media presence.

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### **Prior Plan Strategic Goals:**

- 4- Develop a supporting financial strategy that seeks to establish consistent sources of funding for our mission.
  - Implement a corporate sponsorship fundraising plan.
  - Devise a more effective individual donor fundraising plan.
  - Increase grant application activity.
- 5- Develop an organizational structure to provide sound leadership, a sufficient paid and volunteer workforce, and succession planning.
  - Establish a Board of Directors and maintain access to the existing Board of Advisors.
  - Find a successor to eventually assume overall management of the organization.

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**Miscellaneous:**

1. Neutrality
2. Honest Broker
3. We Always Say Yes  
...Should We Learn to Say No?