

**STRATEGIC PLAN  
FOR  
BRIARPATCH CO-OP  
NATURAL FOODS  
COMMUNITY MARKET**

**MARCH 3, 2009 (PUBLIC VERSION)**

**PREPARED FOR:**

BOARD OF DIRECTORS  
BRIARPATCH NATURAL FOODS COMMUNITY CO-OP  
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## INTRODUCTION

The BriarPatch Strategic Plan was designed and written over a period of months from October 2008 through March 2009. It is a Strategic Plan that builds on previous planning efforts completed in 2005 and provides the goals, objectives and strategies to guide our future actions through the coming years.

This Plan has been developed with extensive input from BriarPatch Board and Staff. The BriarPatch Board delegated their Strategic Planning sub-committee to spearhead this planning process and in November 2008, they contracted with a local consultant to guide the Board and staff through the development of the Strategic Plan. The main steps to reaching agreement on the plan were as follows:

- Day and a half retreat held for all Board and Staff members on November 5 and 6<sup>th</sup> 2008
- First draft of Strategic Plan circulated to all Staff and subcommittee members for comment
- Interviews with all Department Heads and Board President to get feedback on particular sections of the plan that applied to their realm of responsibilities
- Three further drafts were presented to the Strategic Planning sub-committee and Board for review. All comments and recommendations were discussed and incorporated into the Final Plan.

### BriarPatch Board Members

|                |                       |
|----------------|-----------------------|
| Debbie Plass   | <i>President</i>      |
| Peter Van Zant | <i>Vice-President</i> |
| Lew Sitzer     | <i>Secretary</i>      |
| Alan Weisberg  | <i>Treasurer</i>      |
| Malaika Bishop |                       |
| Mark Fenton    |                       |
| Jeff Gold      |                       |
| Joey Jordan    |                       |

### Strategic Planning Sub-Committee Members

|                |                             |                         |                                    |
|----------------|-----------------------------|-------------------------|------------------------------------|
| Debbie Plass   | <i>Board President</i>      | Paul Harton             | <i>General Manager</i>             |
| Peter Van Zant | <i>Board Vice President</i> | Chris Maher             | <i>Director of Operations</i>      |
| Jeff Gold      | <i>Board Member</i>         | Mark Warner             | <i>Director of Finance</i>         |
| Lew Sitzer     | <i>Board Member</i>         | Stephanie Mandel-Austin | <i>Director of Marketing</i>       |
| Louise Jones   | <i>Owner Member</i>         | Heather Wright          | <i>Director of Human Resources</i> |

### Consultant

Janet Cohen, *Community Action Partners*

## VISION

BriarPatch Co-op is the leading natural food store in Nevada County. We are a vibrant, important community hub for gathering and for dialogue and learning about healthful food.

We seek to be a leader in social, environmental, as well as fiscal business responsibility, among both local businesses and food co-ops nationally.

We model community-mindedness and cooperative principles, and hope to inspire others to do the same, and in so doing, contribute to peace and prosperity for all within our reach.

BriarPatch Coop is a place where people of all ages and walks of life come to shop, taste, learn, talk and laugh. Every day people gather to fill their baskets and their minds and hearts with nurturing food and inspiring conversations. Every night families and friends sit down together to enjoy life over plates filled with our fresh, organic, whole foods.

## HOW WE OPERATE

We at BriarPatch, pride ourselves on the integrity of our products and the fact that we sell the highest quality foods possible. We care about offering food that is earth-friendly, produced in a sustainable way and purchased locally.

To our employees, working at the BriarPatch isn't just another job. They care about our customers and about cooperative values. In turn, we care about our employees' welfare and their working conditions.

We like to give back to our community and consider ourselves to be ambassadors for healthy living and a storehouse of knowledge to share with others. Food is our reason for gathering together—food is our connection to ourselves, each other and to our environment. By consciously choosing high quality whole foods we are spreading health and happiness throughout our community and beyond that into the wider world.

## HISTORY

In 1976 the first BriarPatch cooperative retail store—restructured from a “grub club” (food-buying club)—opened in an unheated warehouse building near the airport on Loma Rica Drive in Grass Valley. The store's founders looked to food cooperatives in the Bay Area as models, and took the name BriarPatch from food co-ops in Mountain View and Menlo Park, California.

Much of the food club impetus in those years was rooted in a Depression-era-based desire to acquire food at low prices and to control its source. Many of the co-op's founders were in their fifties, were Quakers, and were involved in a number of other community endeavors. The store sold staple food items in bulk, carried as much meat and other perishables as would fit in its old refrigerators, and made special orders. In the beginning the store was open only to members, who were required to volunteer. Prices were kept close to wholesale, and members paid weekly dues to cover operational costs. The membership totaled around 200.

BriarPatch moved through a series of locations in Grass Valley before moving in 1992 to Joerschke Drive where they expanded and stabilized their employee force and systems. Sales and membership began a swift and steady rise. In 1997 the store hosted a grand reopening in celebration of a remodeling project, which had added 1,000 square feet to the store's retail space. From then on, double-digit sales increases became the standard. Staff, wages, and employee benefits grew commensurately. In 1999, with the

leadership of the Twin Pines Cooperative Foundation, BriarPatch established its Community Fund, an endowment fund to generate interest to donate to local charities.

BriarPatch's double-digit sales growth continued to outpace upgrades made to accommodate it. The Finance and Strategic Planning Committee had begun investigating new store options as early as 1998, but an existing, well-situated 13,000-square foot building was not to be found. In the fall of 2003, BriarPatch signed a letter of intent with the Litton family to lease store space to be built just off the Sierra College roundabout in Grass Valley, only three-quarters of a mile from the current store. The new store opened on May 30, 2007. Its green design and construction is certified by the U.S. Green Building Council's LEED® program for Leadership in Energy and Environmental Design. The new store has an extensive prepared foods deli, dining area, outdoor patio, and a fresh fish and meat counter.

## LONG-TERM GOALS

Now that we have achieved our goal of moving into our beautiful new store, we have set ambitious new long-term goals to guide our work over the next seven years.

The goals we have set reflect our vision for the future and are guided by the principle of the Triple Bottom Line of social, environmental, and fiscal responsibility. The Triple Bottom Line is what differentiates us from all other markets and is a litmus test and a fundamental standard for guiding all our activities in the community. It is a powerful and inspirational organizing tool for our management and staff as well as for our members and customers.

Using the Triple Bottom Line as a guiding principle, we are working to reach the following goals by 2016 -- BriarPatch Coop's 40<sup>th</sup> anniversary.

- 1. To own & develop the entire building complex as a community center with like-minded for-profit and non-profit businesses**
- 2. To have available the highest percentage of regionally grown food in any Coop in California with at least 15% of our products, produced by regional vendors**
- 3. To develop and implement a comprehensive pilot lunch program and school garden at one local public elementary school by 2011, and use this pilot program to inspire other schools to incorporate natural and organic foods into their breakfast and lunch programs.**

We recognize that these are ambitious goals and we will need to work towards them in a strategic way. Having recently achieved our goal of building and moving into a new store, our next few years need to be spent perfecting our systems, training our staff and board, reaching out to the community and examining our product range so that we are a thoroughly sustainable and efficient business, ready to achieve our long-term goals. To help guide this process, we have developed a set of objectives for the next three years which will be supported and implemented by the Board and Staff of BriarPatch Coop.

Many of our goals, objectives and strategies are interlinked. Achieving financial sustainability will allow us to give back more to our members and the community. Educating our community will bring us more customers and members. Improving customer service will attract more loyal customers and improve our bottom-line. Training our Board and staff to work as efficiently and happily as possible will make us more sustainable and profitable.

## OPPORTUNITIES AND THREATS

We recognize that outside forces beyond our immediate control have an effect on our business and vision for the future. However, many issues that can be perceived as a threat can also be seen as opportunities for us to grow. For example, we will need to monitor what effect the current economic crisis has on our business while using it as an opportunity to educate people about low cost, healthy cooking and bulk-buying. We also recognize that while we operate in an area with a small population with competition from other markets, we can seize this as an opportunity to use the unique operating principles of the Coop to develop a diverse and dedicated community of members and shoppers and thereby reach our goals.

## OBJECTIVES

In order to reach our long-term goals we have developed specific objectives for the next three years as follows:

1. To strengthen the financial structure and sustainability of the organization so that BriarPatch is a thriving entity able to support all our goals and programs. Our objective is to increase our revenue by 1/3 (to \$16-20 million) and to reach the National Cooperative Grocers Association top tier for store size.
2. To retain the largest market share of any natural foods grocery store in the County, providing quality local and organic products, and offering necessities at basic prices.
3. To ensure that BriarPatch's Management and Staff are thoroughly trained and operating the most customer-friendly and efficient store in the County.
4. To continue to be a responsible and fair employer and to foster an environment where people are proud and happy to work.
5. To increase our membership by 10% per year and to grow our customer base by 10% per year.
6. To increase our Board of Directors' capacity to support the organization's growth, development, effectiveness, and achievement of the five previously listed goals.

## STRATEGIES FOR REACHING OUR GOALS

- 1. To strengthen the financial structure and sustainability of the organization so that BriarPatch is a thriving entity able to support all our goals and programs. Our objective is to increase our revenue by 1/3 (to \$16-20 million) and reach the National Cooperative Grocers Association top tier for store size*

### **Strategy 1: Refine Planning and Systems**

- Develop a 1 and 3 year financial pro-forma to guide decision-making
- Develop Business Plan to operationalize the Strategic Plan
- Establish Contingency Plan to react to potential economic downturn
- Investigate all the options for buying and financing the building and to clarify what the benefits would be if the building could be purchased
- Establish separate funds and targets for capital expenditures and equipment maintenance

- Continue to work with NCGA on developing joint ventures that would streamline operations; e.g. a centralized IT program throughout the Western Corridor

**Strategy 2: Maximize profitability within the store**

- Devise calendar and tracking system to implement all recommendations for store layout and category management
- Develop a facilities plan that optimizes effective use of the warehouse storage, backroom areas, annex, administrative areas and community room
- Develop Key Indicator Targets for each department
- Develop Numeric Operating Statistics
- Develop engagement, accountability and reward strategies for managers
- Investigate ways to reduce energy consumption by 30%

**Strategy 3: Find a new profit center**

- Form ad hoc committee to investigate potential new businesses or expansion activities

**2. *To retain the largest market share of any natural foods grocery store in the county, providing quality local and organic products, and offering necessities at basic prices***

**Strategy 1: Increase Amount of Local/Regional Products in the store**

- Develop a plan to attain our local produce goals.
- Explore carbon footprint impacts of products in the store

**Strategy 2: Develop Programs for People In Need**

- Form ad hoc committee to develop program
- Continue to donate food to Food Bank, Hospitality House and Interfaith Ministry
- Develop Plan to analyze and promote Basic Buy program
- Enact the low income food program as part of the Patronage Refund Program

**Strategy 3: Develop a comprehensive pilot lunch program and school garden at one local elementary school.**

- Play a leadership role among schools, other agencies and individuals working on bringing healthier foods to the county's school breakfast and lunch programs
- Work with coalition to develop and implement pilot program
- Actively engage members of the public and Coop members in this process as volunteers
- Provide support to school gardens by recruiting volunteers and forming partnerships with local farmers.

**Strategy 4: Improve Merchandizing**

- Devise calendar and tracking system to implement merchandising plan
- Investigate feasibility of a Customer Service desk

*3. To ensure that BriarPatch's management and staff are thoroughly trained and operating the most customer- friendly and efficient store in the County*

**Strategy 1: Expand Staff Training Program**

- Implement the Leadership Dimensions Training for current managers and design goals and performance evaluations in accordance with the training parameters
- Work with Managers to implement a one year Managerial Training program for staff members with management potential starting in first year with assistant managers
- Devise calendar and tracking system and implement a Financial Literacy Program for all managers
- Continue existing Staff Training Program for new staff
- Continue existing Performance Review program for all staff with customer service measurable built in

**Strategy 2: Improve Customer Service**

- Develop a Customer Service Vision Statement for store
- Develop new, or expand current written customer service standards
- Develop and institute new Customer Service Plan
- Institute New Customer Orientation Plan or a greeter system
- Institute Mystery Shoppers system
- Develop regular survey of customers to measure satisfaction with customer service

*4. To continue to be a responsible and fair employer fostering an environment where people are proud and happy to work*

**Strategy 1: Keep BP employees' compensation competitive**

- Regularly monitor wages so that they are in the 50<sup>th</sup> percentile in any given position
- Develop an incentive plan for management team
- Develop a Profit Sharing Policy

**Strategy 2: Keep current on staffing situation**

- Institute regular reports from management tracking HR indicators
- Institute regular staff survey

*5. To increase our membership by 10% per year and to increase our customer base by 10% per year*

**Strategy 1: Develop a Membership Plan to increase membership by 10% per year for the next three years**

- Develop a Membership Plan
- Institute regular Member Surveys
- Develop and explore potential uses of new membership database to improve communication and services to members

**Strategy 2: Develop a Marketing Plan to increase customer base by 10% per year for the next three years**

- Develop a comprehensive Marketing Plan to include bullets below
  - Develop Marketing Goals for the short and long term
  - Examine all current PR materials (website, newsletter and e-news) and to explore new methods of outreach to the community
  - Examine effectiveness of participation in community events
  - Continue and expand regular outreach to local offices, Sierra College, new buildings and other community groups
  - Continue to develop economic alliances with local farmers and producers and make joint presentations to local business groups, etc. as an economic subgroup in Nevada County
  - Develop alliances with local health related businesses and make joint presentations to local business groups, etc. as an economic subgroup in Nevada County
  - Investigate feasibility of providing food to and working with Sierra Nevada Hospital
  - Develop media plan to take advantage of local media opportunities (radio, tv, web, papers)

**Strategy 3: Promote existing services and products**

- Keep records of all charitable donations and sponsorships
- Continue to increase funds in Community Fund and develop distribution plan for funds
- Publicize what discounts members get and do cross promotion with those merchants and businesses.
- Institute New Customer Orientation Plan or greeter system
- Promote the Coop by educating and taking care of people during the bad economy
- Continue to promote local products that are in the store

**Strategy 4: Educate the community about natural foods and products**

- Continue using the website and newsletter to educate the community about natural foods issues
- Continue to promote food related activism
- Hire food education coordinator to expand education programs such as:

***6. To increase BriarPatch Board of Directors capacity to support the organization's growth, development, effectiveness, and achievement of the five previously listed objectives***

**Strategy 1: Develop and standardize Board planning tools, policies and systems**

- Develop and implement Board Annual Plan to include training date, annual retreat, monthly meetings etc.
- Develop, adopt and regularly review the BriarPatch Strategic Plan
- Revise by-laws and policies and institute periodic reviews and updates (Governance Committee). Review term lengths, term limits and board discipline measures
- Adopt Business Plan and institute periodic reviews
- Develop an Annual Financial Report for members for Fall Owners meeting
- Review and formalize all committee functions, frequency of meetings and reporting templates
- Ensure timely annual evaluation of General Manager and develop performance evaluation tools and expectations for this position.
- Ensure expectations are clearly communicated to GM and management team

**Strategy 2: Improve Board/Staff Communications**

- Standardize staff reporting templates for Board Meetings
- Standardize financial reporting methods so that they are measurable, specific and understandable
- Institute a process for communicating with each other and how to overcome communication breakdowns

**Strategy 3: Ensure that Board is well-trained**

- Develop and implement an ongoing Board Education and Training Plan to take advantage of NCGA trainings
- Develop and implement an Orientation Plan for newly elected Board members

**Strategy 4: Be strategic about Board Member Recruitment**

- Develop and implement Board Member Recruitment Plan to enlist and recruit qualified Board candidates
- Develop a Board skills matrix to assess what skill sets are missing on the Board
- Develop criteria for Board member recruitment and an interview process for potential recruits
- Recruit additional community members to Finance Committee who have appropriate business knowledge
- Expand the Board bios so that everyone has a better understanding of Board Members' skills
- Develop a "Board information packet" for prospective Board candidate to understand the responsibilities and work of the Board to contain sample reports, strategic plan and other documents relevant to current activities