



# Organizational Expansion Playbook



# Organizational Expansion Strategy



Redefine the  
organizational  
structure



Evaluate critical  
systems and  
processes



Implement  
documentation  
infrastructure



# Redefine the organizational structure

- ① Identify which roles in the organization will be **centralized versus decentralized**
- ② Clarify **organizational structure** and reporting channels
- ③ Define **hiring plan** that accounts for scaling of a new location
- ④ Define **new ways of working** to build coordination locations

# Identify centralized versus decentralized roles

*Before expansion, determine which roles and responsibilities will be centralized or localized*

## Key questions

- Can this activity be scaled, or does it need to be replicated in a new location?
- Does this role currently have a unique expertise that will be valuable across locations?
- Does this role need to be able to respond quickly to local market conditions?
- Can centralizing this role improve effective communication between locations?
- Does the messaging or activities of this role remain the same regardless of location?
  - Are there different needs of business customers or program beneficiaries across locations?

### Centralized roles

Roles are scaled to serve multiple locations

### Decentralized (local) roles

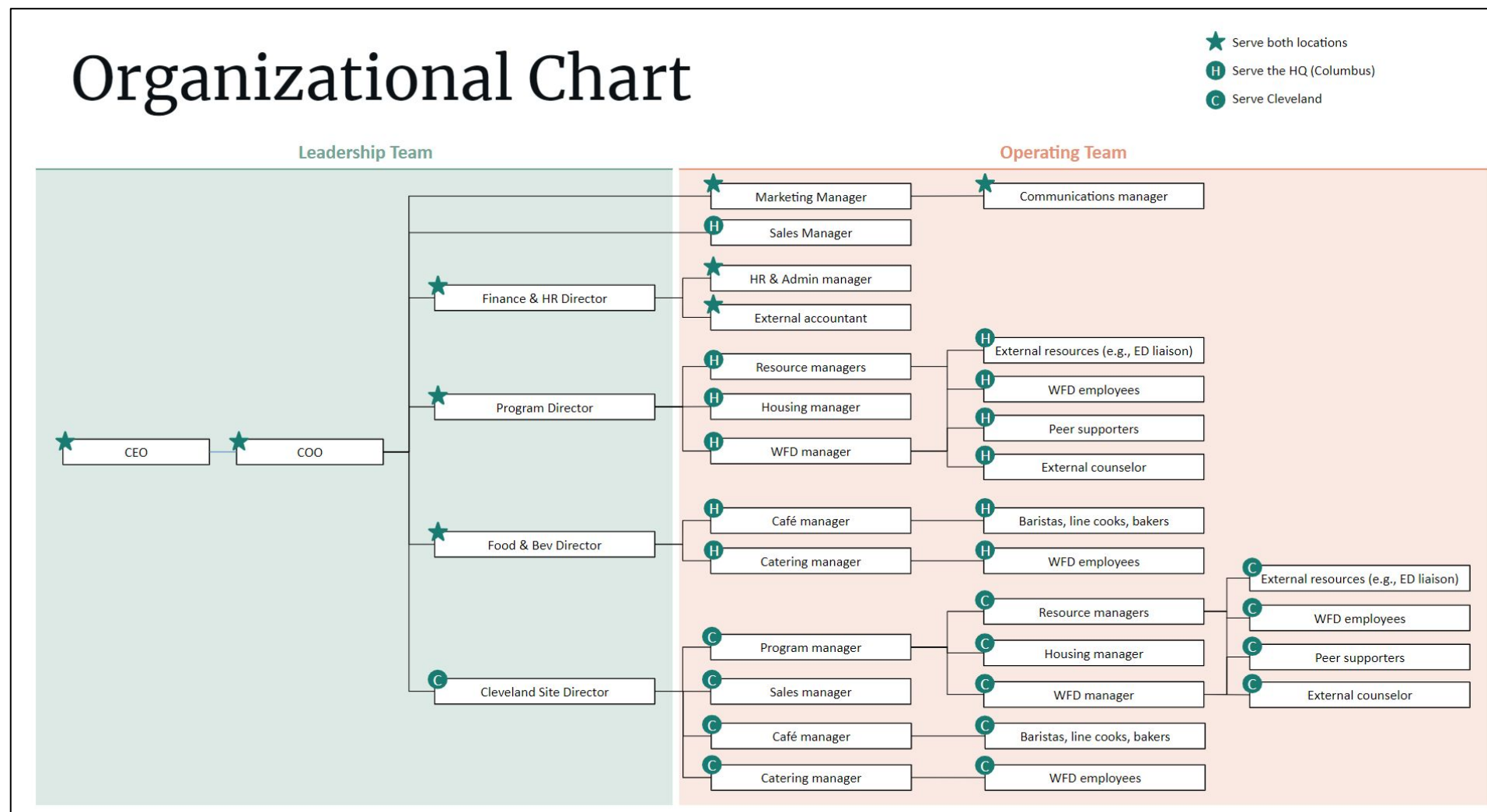
Roles are replicated, based locally and serve a single location

# Clarify the organizational structure and reporting channels

*Based on centralization decisions, create an updated organizational structure to clarify reporting channels*

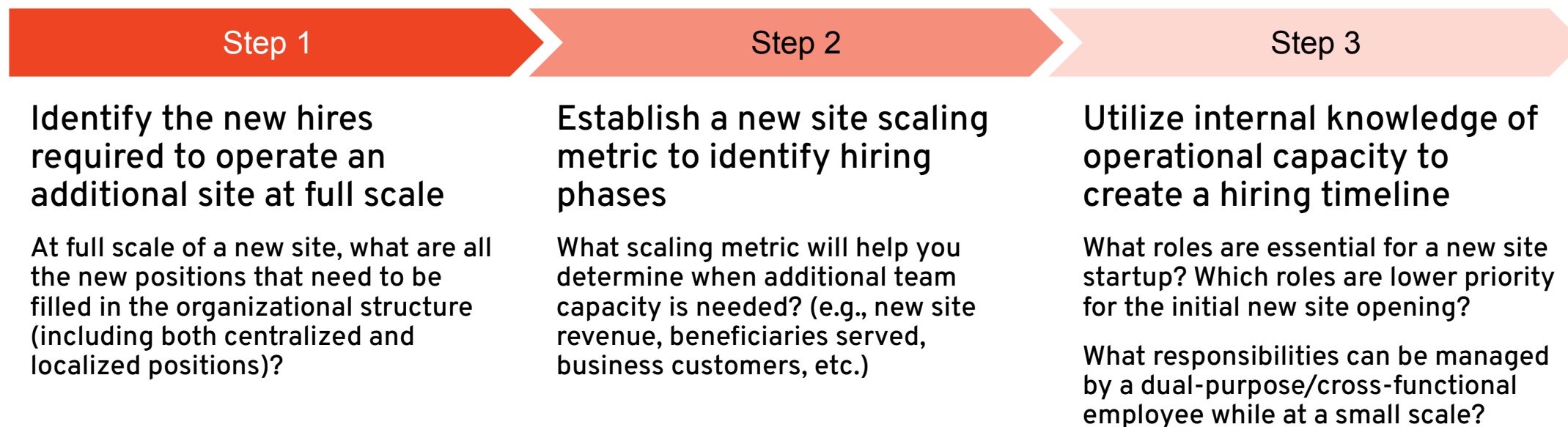
Structure	Description	Considerations
<b>Functional</b>	Organizes the company based on specialized functions (e.g., marketing, finance, HR, program operations, etc.)	<ul style="list-style-type: none"> <li>+ Allows for specialization and expertise in each function</li> <li>+ Increased efficiency for resource utilization</li> <li>- Can create silos in information sharing</li> <li>- Slower decision-making due to the need of cross-location coordination</li> </ul>
<b>Divisional / Geographic</b>	Organizes the company into semi-autonomous units based on geographic regions, with each region having its own set of functions	<ul style="list-style-type: none"> <li>+ Local responsiveness and a better understanding of each region</li> <li>+ Increased focus on location-specific operations and faster decision-making at local level</li> <li>- Duplication of resources and functions</li> <li>- Greater risk of inconsistencies in policies and practices</li> <li>- Potential competition between divisions</li> </ul>
<b>Hybrid</b>	Combines functional and divisional structures, with employees reporting to both functional and divisional managers	<ul style="list-style-type: none"> <li>+ Dynamic and flexible structure with improved communication</li> <li>+ Promotes efficient use of resources and roles</li> <li>- Multiple reporting channels can be complex and confusing</li> <li>- Increased risk of power struggles and conflicts with multiple reporting channels</li> </ul>

# Example | Hybrid organizational structure with labeled centralization





# Define a hiring timeline based on the new site scaling



# Example | Hiring timeline

## Step 1

**Identify the new hires required to operate an additional site at full scale**

**At full scale of a new site, what are all the new positions that need to be filled in the organizational structure (including both centralized and localized positions)?**

## New site local staff requirements

- 1 **Site Manager:** Oversees day to day operations at new site; accountable for local team, culture, business results, and community relationships; reports to Integrator.
- 2 **WFD Program Lead:** Oversees local Workforce Development Program; responsible for program participants, curriculum, and outcomes.
- 3 **Client Services / Resource Managers:** Supports case management and treatment for program participants.
- 4 **Housing manager:** Oversees housing management and provides support to program participants.
- 5 **Community Engagement Lead:** Coordinates local volunteers, strategic partnerships, and community events, and supports local business development.
- 6 **Sales Lead:** Responsible for business development and customer experience
- 7 **Kitchen Manager:** Oversees catering operations and staff; responsible for product quality.
- 8 **Kitchen Staff:** Execute day-to-day food prep, assembly, and delivery.



# Example | Hiring timeline

## Step 2

Establish a new site scaling metric to identify hiring phases

What scaling metric will help you determine when additional team capacity is needed? (e.g., new site revenue, beneficiaries served, business customers, etc.)

## Phases of Responsibilities

	HQ	Phase 1	Phase 2	Phase 3	Steady State
	<b>Columbus</b>			<b>Cleveland</b>	
<b>Marketing manager</b>	<b>Devin</b>			<b>Devin</b>	
Design & PR	Devin			Devin	
Communications	Kenzie			Kenzie	
<b>Sales manager</b>				<b>Site Manager</b>	
Sales Management	Sales manager	Site Manager			Sales manager
<b>Engagement &amp; Development</b>	<b>Katie</b>			<b>Katie</b>	
Grant Management (incl data)	Katie	Katie			Katie + Admin
Donor relations & events	Katie		Engagement manager		
Volunteers	Nikki	Engagement manager			Volunteer manager
<b>Food &amp; Bev Operations</b>	<b>Chef Laurie</b>			<b>Site manager</b>	
Catering Management	Tamara			Catering manager	
Café Management	Laurie			Café manager	
<b>Program Operations</b>	<b>Vanessa</b>	<b>Site manager</b>		<b>Program manager</b>	
Client Services	Jamie + Brooke	Resource Manager (1)	Resource managers (2)		Resource managers (2-3)
Housing	Dorie	Resource Manager (1)	Resource managers (2)		Housing manager
WFD	Lindsey		WFD Manager		
Education	Volunteer	Resource Manager (1)	Resource managers (2)		Volunteer
Events / Activities	Jamie + Brooke	Resource Manager (1)	Resource managers (2)		Resource managers (2-3)
Community Training	Vanessa + Brooke	Resource Manager (1)	Resource managers (2)		Resource managers (2-3)
Peer Support	Various	Resource Manager (1)		Peer supporter	
<b>Finance + HR</b>	<b>Barbie</b>			<b>Barbie</b>	
Accounting Admin	Lexi			Lexi	
Office Management	Various			Site manager	

# Example | Hiring timeline

## Step 3

Utilize internal knowledge of operational capacity to create a hiring timeline

What roles are essential for a new site startup? Which roles are lower priority for the initial new site opening?

What responsibilities can be managed by a dual-purpose/cross-functional employee while at a small scale?

## Phases of Hiring

### HIRING TIMELINE



#### Columbus Roles:

- Sales manager

#### Columbus Roles:

- Grant admin

#### Cleveland Roles:

- Site manager
- Engagement manager
- Catering manager
- Café manager
- WFD manager
- Resource manager #1

#### Cleveland Roles:

- Resource manager #2

#### Cleveland Roles:

- Sales manager
- Volunteer manager
- Housing manager

#### Cleveland Roles:

- Resource manager #3
- Engage volunteers

# Outline new ways of working

Establish formal ways of working and organizational practices to build community across locations and create a culture of “one team”

## Examples of community building practices:



### Organization-wide meetings

*Monthly town halls that outline program performance/impact, celebrate team accomplishments, and provide updates on upcoming events*



### Leadership presence

*Leadership establishes a regular cadence to visit different locations to foster relationships with employees and participants*



### Cross-office projects

*Establish project teams comprised of employees across offices to reduce competition between locations*



### Cross-office trainings

*Train employees hired for a new site at an existing location during initial onboarding; bring all employees to the headquarter location for sporadic trainings*



### Community support

*Have representation from various locations at each other's office events, graduations, etc.*



# Evaluate systems and processes

- ① **Identify critical systems and processes and evaluate scalability and replicability of each system or process**
- ② **Define and prioritize adjustments to processes and systems**



# Identify and evaluate critical processes and systems

## Identify the organization's critical processes and systems

- What are the processes and systems that make the organization effective

## Evaluate critical processes and systems for scalability and replicability

- How does the current process or system work?
  - Is the process formalized and documented?
  - Are there any current gaps or deficiencies that should be prioritized regardless of expansion?
- Considering expansion, are you trying to scale or replicate the process in a new location?
  - Are there any parts of the process that need to be tailored based on location (e.g., potential adjustments to critical processes and systems landscape)?

## Define potential adjustments to critical processes and systems

- What changes would need to be implemented to increase efficacy in expansion?

# Example | Critical systems and processes

- Process established and ready to scale
- Process can scale, but will be more effective with adjustments
- Process is unable to scale without adjustments

## Engagement & Development (I/II)

Critical Processes & Systems	Scaling readiness	Current situation	Adjustments	KPIs / Metrics
<i>Centralized</i>				
<b>Planning:</b> Fundraising strategic plan		Strategy refreshed with Flying Whales to optimize fundraising activities; Open communication channels with leadership team, but no formal cadence for strategy reviews relating to major donors	N/A	N/A
<b>Planning:</b> Capital campaign planning		Utilized by leadership team on an as-needed basis for location expansion; Strategy completed with Cramer consultants	N/A	N/A
<b>Donor management:</b> Fundraising / Donor relations		Structure recently added to donor relations (frequency of interactions, notes on interactions and priorities, purpose of donation, etc.) through Bloomerang; List of major donors in progress	Source referrals from existing network to connect with additional funders; Formalize funder marketing materials and messaging using program logic model	Activity completion through Bloomerang
<b>Donor management:</b> Corp engagement / Sponsorships		Sourced through word of mouth or visibility through catering services – companies largely prefer having a speaker to explain FALC mission and purpose; No specific outreach strategy in place	Analyze cost requirement of additional grant support through an admin role	N/A
<b>Donor management:</b> Data and metrics		Data input by program operations team and available to be pulled for grant writing and reports; Discrepancies exist across data (missing data and method of data pull)	Standardize methodology for data pulls and reported KPIs	Reporting consistency
<b>Grants:</b> Grant writing and management		Leadership team meets at a monthly cadence to align on grant portfolio – details of grants tracked through spreadsheet and listed on GrantStation; Sourced from external recommendations (REDF, Human Services Chamber, etc.), corporate websites, comparative Form 990s	Analyze cost requirement of additional grant support through an admin role	Grant funding received Grant applications submitted

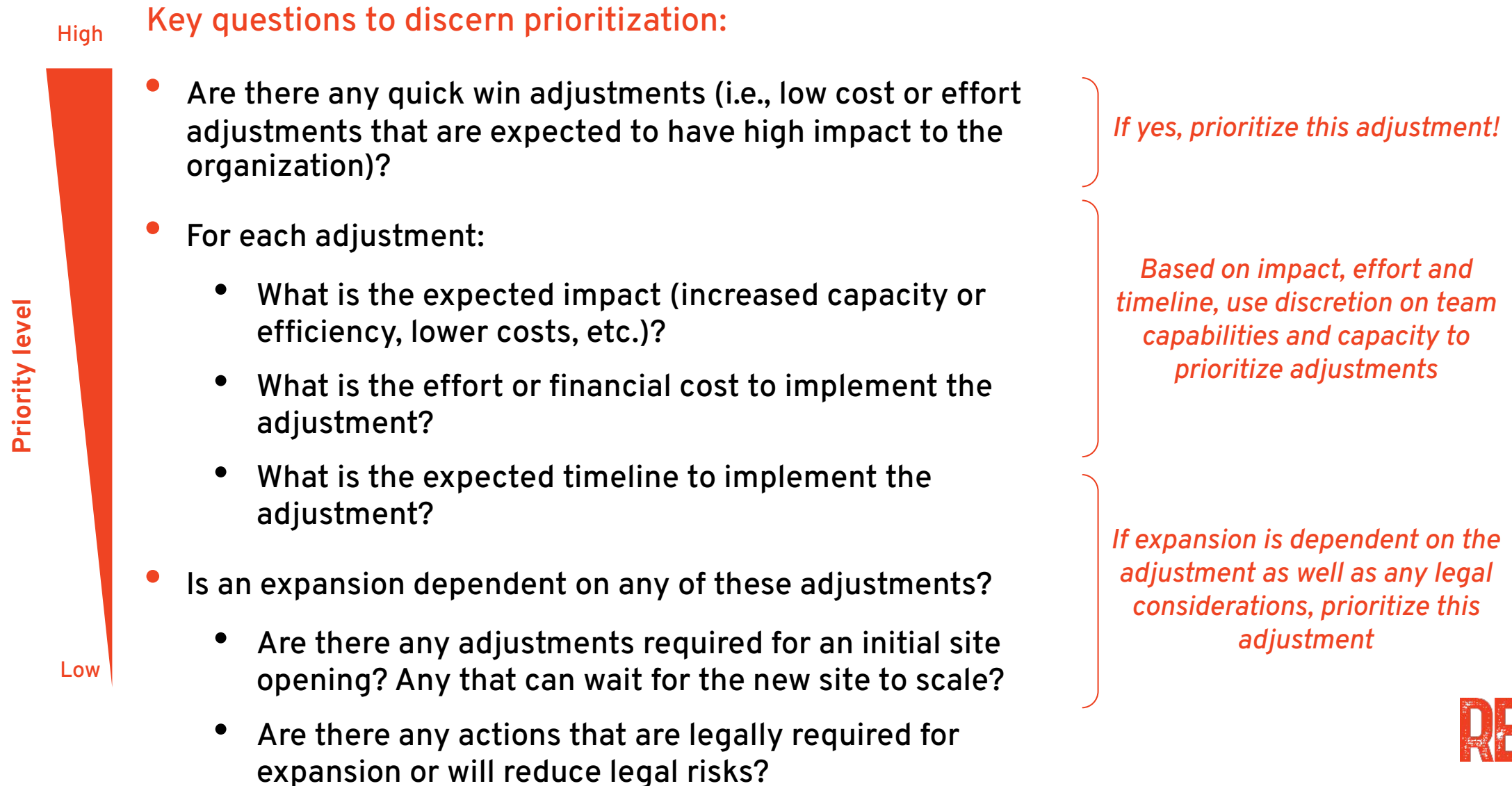
# Example | Critical systems and processes

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## Engagement & Development (II/II)

Critical Processes & Systems	Scaling readiness	Current situation	Adjustments	KPIs / Metrics
<i>Local</i>				
<b>Grants:</b> Compliance	<span style="color: red;">■</span>	Compliance proven through grant reports; Limited communication and oversight to ensure compliance	Implement formal review cadence with program operations to ensure compliance; Share grant spreadsheet with program operations team	Grant compliance rate
<b>Partnerships:</b> Community relations & partnerships	<span style="color: yellow;">■</span>	Sourced through word of mouth, catering sales, and marketed volunteer opportunities; Currently no template or structure for outreach communications	Define brand awareness strategy and partnership outreach plan to expand community relationships for collectives and mentorship	Number of community partners
<b>Events:</b> Fundraising and community events	<span style="color: yellow;">■</span>	No specified cadence or goal aside from largest annual fundraiser (EatUp) that is centrally planned by the engagement and leadership team	Leverage partnerships to host fundraising events; add capacity to engagement team to support annual fundraising event planning	Fundraising gained through events
<b>Volunteers:</b> Recruiting and training	<span style="color: red;">■</span>	Volunteer requirements and prerequisites are clearly defined; Volunteers not tracked consistently and mentors do not have a clear feedback loop	Standardize and integrate volunteer tracking system to manage the Freedom network; Establish a mentorship reporting system	N/A
<b>Volunteers:</b> Scheduling and engagement	<span style="color: green;">■</span>	Completed by the engagement and development team; Managed by part-time employee	N/A	N/A

# Prioritize adjustments





# Example | Identification and prioritization of adjustments

## Identification of adjustments

Themes	Tactical adjustments
<b>Democratize access to information</b>	Introduce a shared document platform
<b>Clarify Freedom's logic model</b>	Validate all program operations and resources based on goal outcomes Define fundraising strategy and messaging based on proven outcomes Identify and document processes and systems in SOPs to act as a source of truth
<b>Implement documentation infrastructure</b>	Utilize documentation to develop training and onboarding materials and maintain program quality, especially for trauma informed managers Articulate culture of organization and share values
<b>Reallocate roles and responsibilities</b>	Reallocate scheduling responsibilities to the catering and café managers Reallocate vehicle maintenance responsibilities to catering manager Reallocate job reviews and other finance admin tasks to junior HR employee or an additional HR admin
<b>Fortify reporting practices</b>	Define KPIs and metrics to be tracked across the organization Standardize methodology for data pulls and reported KPIs to ensure consistency
<b>Define brand awareness strategy and partnership outreach plan</b>	Define brand awareness strategy across marketing efforts Structure partnership outreach plan to replicate critical community partnerships (i.e., photographer, PR partner, counselor, collective leaders) Identify existing organizations working in the new location that can be leveraged for connections
<b>Increase support in centralized roles</b>	Analyze financial feasibility for additional kitchen ordering, grant support, accounting admin staff, and peer supporters
<b>Strengthen grant compliance</b>	Structure formal review cadence with engagement and program operations to ensure compliance Share grant tracking documents with program operations team
<b>Explore platform integration</b>	Explore food and beverage platform integration with additional FALC platforms to facilitate reporting and increase team capacity

## Prioritization of adjustments

Priority Level	①	<b>Democratize access to information</b> to ease the process of knowledge transfer
	②	<b>Implement documentation infrastructure</b> to record processes in SOPs and develop training and onboarding materials to maintain program quality
	③	<b>Reallocate roles and responsibilities</b> to increase team capacity, particularly in catering management and finance and HR
	④	<b>Clarify Freedom's logic model</b> to validate program operations and resources as well as define the fundraising strategy based on proven outcomes
	⑤	<b>Fortify reporting practices</b> by defining standardized KPIs across functions and data methodology
	⑥	<b>Define brand awareness strategy and partnership outreach plan</b> , including leveraging existing relationships and referrals to replicate wraparound services
	⑦	<b>Increase support in centralized roles</b> by analyzing the financial feasibility of new hires (e.g., HR admin, additional grant writer, and peer supporters)
	⑧	<b>Strengthen grant compliance</b> by implementing a formalized review between the engagement and program operation teams
	⑨	<b>Explore platform integration</b> for reporting. Integrate Spoonfed and Toast with Bloomerang, Quickbooks, and Expensify to facilitate program management



# Implement documentation infrastructure

- ① **Introduce SOPs (“Standard Operating Procedures”)**
- ② **Create an SOP tracker**
- ③ **Build SOPs**

# Introducing SOPs

## What is an SOP?

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A “Standard Operating Procedure” (SOP) is a set of instructions that describes the context and step-by-step process with which to get anything done.

SOPs can be built for any functional area, process or system, and creates a “source of truth” to how the organization operates. SOPs can help an organization standardize operations and ensure quality across locations.



## SOP best practices

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- Use clear, simple language that is easy to remember
- Avoid dense paragraphs that are hard to digest – use subheaders and bullet points whenever possible
- Standardize SOP formatting to maintain consistency
- Include any necessary context to understand why this process exists
- Include links to other relevant documents that are part of the process
- Include screenshots if it could be helpful for the reader
- Treat the SOP as a living document that evolves as the organization evolves
- Encourage readers to ask questions to both clarify descriptions and validate parts of the process
- Save SOPs in a structured folder system

Consolidate all processes and systems into one SOP tracker to manage the ownership, creation and content of the organization's SOP

- 1 Clearly establish owners of the SOP process and each individual SOP
- 2 Identify the functional folder where the SOP will be located
- 3 Prioritize SOPs based on: strength of current process, impact of the process to org operations, knowledge concentration within the org
- 4 Track SOP status and last update to facilitate SOP creation and management
- 5 Detail what is included in each SOP, to act as a table of contents across all SOPs



# Build SOPs

The SOP process owner drives the SOP creation process, using the tracking document:

- Each SOP owner creates a draft at an **established cadence permitted by team capacity**
- Drafts are reviewed by the SOP process owner, who leave comments or questions on the document to clarify or validate information
- It's better to have a 'bad' draft of an SOP than none at all!

*Recommendation: Record yourself walking through a process using [FathomAI](#) – a free notetaking resource – which provides a transcript. This transcript can be used as the basis for an initial SOP.*

o If any columns are being flagged as red, update the column header to be the correct

- Select "Send test" in top right corner of content editing screen → add who you want test email to go
- Go to
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Step 2 - Fill out structural information for the email

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Step 5 - Send

- Select
- To se

How do I send out an email through MailChimp to a specific audience?

All steps completed in MailChimp, no other resources needed:

Step 1 - Design and format the email based on topic

- On the left hand-side menu list, select "Campaigns" → "All Campaigns" in "List" view
  - o This will provide a list of all previous emails and texts sent out
- Find an email that was formatted for the same topic of your desired email
- Click the down arrow next to the "View Report" button on the right hand-side of the email listing → Select "Replicate"
  - o This will allow you to create a new email using the same formatting and design of a previous email

Step 4 - S

## EMAIL MARKETING

### Email marketing overview

Email marketing is used to serve multiple audiences – donors, cafe customers, catering customers, volunteers, event attendees, butterflies, etc. – and is managed using [MailChimp](#). [Here is a direct link to the login](#). General guidelines to follow when completing email marketing:

- Mailchimp emails are planned and outlined in this [Email Calendar](#) (including date, time, and topic/email subject)
  - o Email topics (cafe, catering, programming/voices of freedom, fundraising, etc.) are planned and alternated based on upcoming events and news
- Based on the topic, emails will be sent to specific audience segments within Freedom's network
- Email formatting and messaging should follow these [brand guidelines](#)
- Emails are kept at a cadence of **once per week** to prevent annoying audiences

Topics in this SOP:

1. [How do I send out an email through MailChimp to a specific audience?](#)
2. [How do I create a new audience group or update an existing audience group in MailChimp?](#)
3. [How do I create an automated email journey?](#)
4. [How do I look at email analytics and reporting?](#)

Separate from the email campaigns sent through MailChimp, [Toast Cafe POS system](#) will also auto email cafe customers based on prompts such as: new customer, lack of activity for a specific period of time, etc. Overall, Toast is not used for email blasts aside from cafe engagement.

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Step 4 - S



An investment that works.

Thank you!