

# FIVE YEAR STRATEGIC PLAN 2013 - 2018



Weavers Way Co-op Five Year Strategic Plan  
2013-2018

July 2013



## FOREWORD

### 40 Years Old: Challenges and an Exciting Future

After 40 years, Weavers Way stands at another important strategic point. The co-op movement nationally is on an upswing, the United Nations celebrated the Year of the Co-op in 2012 and, in Philadelphia, there is a strong interest in starting community-owned stores in other areas of the city. What should Weavers Way's role be in this resurgence of co-op development? After expanding Weavers Way three years ago, and this year with additional stores, is it time for us to expand to a third location or a fourth?

Just five years ago, we were wondering if we should expand to a second store. Today we are looking at another market study to help us pinpoint how well we are doing in our current locations and where we should consider expanding in the future.

Membership has increased from 2,700 to more than 5,000 households since the last strategic plan. Formerly, members had to do work hours as a requirement of membership. Today, how do we increase the number of members and especially the number of working members as a percentage of the total membership count?

With expansion come new opportunities for looking at what we do and how we do it. An operation of one store is quite different from our current organization of three stores and two farms. What kind of benefits can being bigger offer us in terms of purchasing, organizing ourselves, coordinating across multiple locations and staff development? What kind of challenges must we learn new skills to manage?

Our culture has changed over the last five years, as one would expect with a change in stores and membership. The Co-op staff has increased from 65 to more 145, a twofold-plus increase. This has brought in a new group of young, energetic staff members who are mission-driven and understand customer service. Weavers Way must find a path to incorporate, and benefit from, these new staffers. They are the future and they are transforming Philadelphia with urban farming, ethical understanding of food and food-justice issues and the strength to make change happen.

In this strategic plan, you will read that the urban-farming component is now an important part of the Co-op's mission. In just a few years, the urban-farming movement has exploded throughout Philadelphia and other urban centers in the United States. Envisioning farming's role in the Co-op of the future is the work ahead.

A Weavers Way committee worked for nine months, conducting interviews with community stakeholders, board members, staff at all levels and member owners. The committee spent countless hours meeting with members, surveying shoppers and collaborating with other staff to write each section of the plan. They worked tirelessly to bring all the data together. As a co-op, we want to execute our mission and meet our Ends while at the same time being aligned with our member owners. Only through this work can we find our direction. I know I speak for all of our members and staff when I say that we are thankful for the committee members' dedication to the Co-op, the community and the Ends of Weavers Way.

I look forward to the next five years as we move into the future. It seems that 2019 is far away, but as we know, we will be busy working towards these goals and five years will fly by before we know what happened.

Glenn Bergman  
*General Manager*  
July 1, 2013

## EXECUTIVE SUMMARY

This 2013-2018 Weavers Way Co-op Five Year Strategic Plan builds upon the 2007-2010 Strategic Plan and is a combination of analysis of the present and imagination for the future. This document consists of external (local and national) scans as well as an internal scan designed to identify current trends and to provide a snapshot of the environment in which the Co-op is currently operating. This plan also contains the voice and vision of Weavers Way leadership, staff, members and community partners concerning the Co-op's five-year future.

In this plan, we have identified five themes that cut across each of the four focus areas we have outlined: identity, growth, membership, efficiency and diversity. While each of the focus areas provides us with a specific and tactical place to direct our attention and effort in the coming years, the themes that cut through these areas provide a picture of the larger, high-level issues that are at the core of the strategic questions facing the Co-op. As you read the plan, watch for these themes to surface in the focus areas:

**Expansion:** In preparation for creating this plan, we spoke with many Co-op stakeholders about their view on Co-op expansion. This plan outlines our next steps toward considering expansion into a third store and addresses our need for stronger financial standing prior to making any decisions. It also explores additional areas for growth that don't involve another store, such as other lines of business or additional facilities.

**Internal Operations:** Due to the growth Weavers Way has already undergone in the past few years, this plan outlines ways the Co-op can be more systematic and efficient to support that growth.

**Membership and Community Engagement:** The Weavers Way membership base is much larger than it was several years ago but we found that members still want the same thing: a central community point that facilitates meaningful interactions among members that lead to a cohesive community. This plan identifies ways the Co-op can explore how it will continue to be the central point of the community even if this happens differently today than it used to. This plan articulates the clear desire to help other local co-ops get started and the need for Weavers Way to define its relationship with the nonprofit Weavers Way Community Programs. Additionally, this plan addresses our many partnerships in the community and our desire to support the local food movement and issues that are important to us.

**Farms:** The feedback we received while creating this plan showed us that the farms are a very important part of Weavers Way. However, the analysis we did also indicated that the farms need to be more financially sustainable. This five-year plan addresses how we can move toward figuring out a more financially viable business model for the farms while supporting and promoting them in the meantime.

## CO-OP HISTORY

### 1970s

Founded in 1973, Weavers Way Co-op is a member-owned retail cooperative that provides a friendly shopping environment and a wide variety of quality foods with an emphasis on nutrition, sustainability, social and environmental awareness and local sourcing, at prices lower on many items than supermarkets (e.g., organic, local, spices, bulk goods).

Weavers Way was originally envisioned as a neighborhood buying club without a work requirement. Founder Jules Timerman went door to door collecting \$10 investments from people interested in his idea. This co-op, first based at Summit Church, Greene Street and Westview Avenue, and then in rented quarters at the old Sid's Deli, 555 Carpenter Lane, was based on a very informal organizational structure and Jules's buying philosophy, which was focused on getting good deals and offering low prices. Some members at the time had experience with other co-ops and wanted a more formal structure, with a board, bylaws and committees. The differences over business processes eventually led to Jules's departure, after which Norman Weiss became manager in April 1975. Weavers Way soon moved to 559 Carpenter Lane, which Jules had purchased before leaving, and in the next few years Weavers Way grew very quickly. Expansion soon became an issue, and in 1979 Weavers Way bought the Munn Roofing building in middle of the 500 block of Carpenter Lane. The Munn building needed lots of work and the cost of improving it would have exceeded the completed building's market value. At a well-attended membership meeting to decide how best to proceed, a "smaller is better" faction narrowly won a vote leading to the sale of the building. Additionally, following a series of "house meetings," the Co-op decided to implement a six-hour-a-year work requirement for members.

### 1980s-1990s

In 1988, the purchase of sites at Greene and Hortter streets and at Germantown and Gowen avenues were considered and rejected. In 1989, Weavers Way tried unsuccessfully to buy Gem Cleaners at 546-548 Carpenter Lane, and then succeeded in buying 551 Carpenter Lane.

In 1991, Weavers Way purchased 557 Carpenter Lane. Renovations completed in 1993 joined 559 and 557, doubling the size of the store. Although the expansion was a success, one of the lessons learned was the importance of addressing changing organizational and structural needs prior to or concurrent with any physical expansion, as well as the need for managers to remain involved on the sales floor. Staff should not be expected to function as they had done before expansion.

### 2000-2013

In 2002, Weavers Way purchased 608 and 610 Carpenter Lane with the intention of opening a prepared foods takeout store and sit-down café. These plans were indefinitely put on hold with the onset of a financial crisis.

By 2004, the Co-op had successfully navigated the financial crisis and emerged a stronger organization. The lessons learned have in large part been implemented, and Weavers Way became different in many ways from the organization it had been just a few years earlier. There was also an influx of new people on the staff and the board as a result of efforts to attract experienced people from outside Weavers Way.

As new membership surged, it became clear that the Co-op was ready for some type of expansion. Discussions soon resumed on how to best proceed with expansion, and in 2005, Weavers Way purchased 555 Carpenter Lane, a residence immediately adjacent to 559/557 Carpenter.

In 2007, the Co-op took an opportunity to turn its mostly volunteer-run farm program on the grounds of Awbury

Arboretum in Germantown into a commercial operation run by a full-time farmer. This began the Co-op's farm program, which has grown to include a community-supported-agriculture program in partnership with the W.B. Saul Agricultural High School in Roxborough, a school garden at Martin Luther King Jr. High School in Germantown and a garden at the Stenton Family Manor homeless shelter in Mount Airy. At this time, Weavers Way Community Programs was started as the nonprofit arm of the Co-op. WWCP was created to enable Weavers Way to meet the community-program goals that members had addressed in the 2004 strategic plan.

In 2008, the Co-op was approached by the Ogontz Avenue Revitalization Corp. (OARC), which asked Weavers Way to open a store in West Oak Lane. In an effort to increase the availability of local and fresh food, Weavers Way agreed, and opened Weavers Way Ogontz at 2129 72nd Ave.

In the meantime, the main Mt. Airy location continued to operate at maximum capacity. Seeing the need for some form of expansion to alleviate traffic in the flagship store, the Co-op conducted a market study and held a series of house meetings to determine what should be done. As a result, in May 2010, a third Weavers Way location opened at 8424 Germantown Ave. in Chestnut Hill, the former site of Caruso's Market.

In 2011, after much deliberation, Weavers Way decided to transfer ownership of the struggling Ogontz store back to OARC, which shortly thereafter announced its plan to reopen the store as a non-cooperative community market. Today, a family-owned corner store occupies the space.

In the summer of 2012, the Co-op decided to give its well-worn Mt. Airy location a facelift by renovating the store with new fixtures and moving the health, wellness and beauty department "Across the Way" to 608-610 Carpenter, enhancing the "Mt. Airy Village" effect. The renovation of the main store included installing a large bulk-foods section on the second floor.

## Today

Weavers Way has changed in many ways over the course of its history, but it has retained an atmosphere of vibrant community spirit, benefiting from the creativity and commitment of strong individuals working together toward common goals and determined not to lose sight of the meaning of Weavers Way to its members and the community at large.

Today, Weavers Way offers a wide array of products and services while maintaining the friendly feeling of a cozy store in a residential neighborhood. Members continue to realize benefits in several ways. The Co-op is owned by its members, so there is no owner taking profits off the top. Labor costs are offset somewhat by member work hours and capital costs are offset by member equity.

Weavers Way's governance model follows the Policy Governance philosophy. The organization is governed by a democratically elected board of directors that sets long-term goals and limitation policies and looks out into the future. This all-volunteer board establishes "Ends" that define the philosophy of the organization and hires a general manager to run it. The general manager, in turn, sets direction through a strategic-planning process and hires staff. The general manager, acting as CEO, is accountable to the board. Through a monthly report to the board on how the general manager and staff are meeting the Ends, together the board and the general manager set strategic and fiduciary priorities for the Co-op. Member committees provide a means for members to participate with the board and staff in furthering the Co-op's mission.

The Co-op recognizes its responsibility to its 5,000 member households and Weavers Way has a CFO, financial controls, an active Finance Committee and comprehensive financial policies covering financial conditions, planning/budgeting and asset protection.

In addition to the everyday interactions that take place within the store and the community, Weavers Way communicates with its members in several other ways. Most notable is *The Shuttle*, a monthly newspaper that is delivered to 6,800 households and also available in cafes, retail outlets and other community gathering

places throughout Northwest Philadelphia. It is also distributed in Weavers Way the stores. It contains useful and interesting information about the Co-op and its members, consumer affairs, community issues, food and nutrition and issues affecting the cooperative movement nationally and internationally.

Weavers Way's strong commitment to community is reflected in a number of ways. Weavers Way sponsors workshops, film series and internships and actively supports numerous community organizations. The Weavers Way Farms provide a rich educational resource and produce that is organically grown and as local as possible. WWCP's Marketplace Program partners with a number of local schools, establishing school-based food co-ops where students buy healthy, locally produced products from us at cost and sell them to their school-mates, gaining experience while earning profits that they donate to worthy causes in the community and around the world.

## Co-op Principles

-  1 Voluntary and Open Membership
-  2 Democratic Member Owner Control
-  3 Member Owner Economic Participation
-  4 Autonomy and Independence
-  5 Education, Training and Information
-  6 Cooperation Among Cooperatives
-  7 Concern for Community



## Weavers Way's Product Philosophy Statement

Weavers Way Co-op strives to uphold a variety of principles in making decisions about what products to purchase for resale to our members. Because we are owned and operated by members, our product philosophy reflects the diversity of our membership. The philosophy that underlies our buying decisions might best be described as "healthy eclecticism." While we strive to appeal to the broadest demographic, our decisions about which products to purchase are also informed and guided by our responsibility to maintain a fiscally sound operation. When and where possible, the following guidelines support our buying decisions at Weavers Way:

- We are committed to providing products for which we have full nutrition and source information and to providing this information to our members.
- We purchase products that are cooperatively or collectively produced.
- We buy products that are locally and/or regionally produced and that support the local economy.
- We buy products from independent suppliers and producers and from small businesses.
- We are committed to buying the freshest products available.
- We offer products at cost savings to members.
- We provide choices for our members and offer product alternatives (e.g., organic vs. nonorganic, gourmet/specialty vs. value-priced, bulk vs. packaged/processed).
- We purchase eco-friendly products that do not adversely affect the environment; we avoid purchasing products that have been proven detrimental to human health or the environment.
- We attempt to buy products from businesses that support conditions of shared wealth and do not exploit workers.

## EXTERNAL AND INTERNAL SCANS

So what did we find? We took a systematic look at the world as it related to our ultimate decisions for the direction of Weavers Way. In the next part of this document, we review elements of the context that influenced the ultimate direction we chose. As you read, pay attention to what interests YOU.

### National Trends

Because Weavers Way is part of a larger series of systems, it is important that our plan be made in the context of our external environment.

One of the major factors influencing Weavers Way on a national level is the growing market for organic, local and quality food. However, along with growing market share for these types of foods is growing competition. Some of this competition comes from other healthy-food outlets like Whole Foods and Trader Joe's. However, other more mainstream stores are increasingly competing in this market. For example, in 2011, Walmart was one of the largest sellers of organic produce in the United States. This fact is a great example of a strategic "threat" that Weavers Way now faces that indicates the need to revisit what truly distinguishes a co-op in general, and Weavers Way in particular. If it isn't about access to organic foods in the way it has been in the past, what could it now be? As we held our meetings and discussions, issues like this kept coming up. There are financial and identity implications for us in the mainstreaming of natural and organic food.

While conventional grocery stores present competition for specific cooperative markets, they have not appeared to impact the growth and viability of co-ops as an approach to business. As an indicator of cooperative growth, the United Nations designated 2012 as the International Year of the Co-op.

There are positive national trends for co-ops. We believe co-ops are positioned well for growth, as the importance of conscious capitalism is increasingly prevalent. In his recent book "Conscious Capitalism," Whole Foods CEO and former co-op worker John Mackey argues for the traditional co-op belief in the necessity for organizations to focus on the "triple bottom line" and the well-being of all stakeholders involved in the organization. As this sentiment continues to proliferate, co-ops are well positioned for growth as paragons of how to live out these values. A second trend that anecdotally supports this movement to values-based organizations is a heartening resurgence of interest among younger people in working for organizations that reflect their humanistic values. Members of our strategic planning committee spoke passionately and at length about this shared value among our younger members and staff.

### The City of Brotherly Love

In Philadelphia, the city population is growing, as is the local co-op community and the city's commitment to local and healthy food. According to the U.S. Census Bureau, the population of Philadelphia grew by more than 10,000 in the last three years and this trend seems to be gaining speed.

The Philadelphia region has recently seen new co-ops open their doors and existing co-ops find storefronts or grow into a larger digs. Some examples of this are Creekside Co-op in Elkins Park, which opened at the end of 2012; the South Philly Food Co-op, which is in the process of finding its first storefront location; and Mariposa Co-op in West Philadelphia, which recently moving into a larger building. In addition to local co-op growth, the city was the host for the 2012 Consumer Cooperative Management Association. The Philadelphia Area

Cooperative Alliance was formed out of this conference with the mission to “improve the Philadelphia region by growing the cooperative economy.”

As if all this co-op love were not enough, Mayor Michael A. Nutter and the City of Philadelphia have also been vocal advocates for urban farming and local food. In 2012, the city reformed the zoning code to formally acknowledge urban agriculture as its own use category and allowed it in most residential and commercial districts. Also in 2012, the Mayor’s Office for Sustainability released the “Greenworks Philadelphia” progress report, which restated the Sustainability Office’s goal of bringing local food within 10 miles of 75 percent of city residents. The report noted that, since 2009, the city has added 24 new farmers markets and 29 new farms or gardens. This commitment to urban agriculture and local food as well as to environmental sustainability is moving Philadelphia toward Mayor Nutter’s goal of being the greenest city in the United States.

These facts present many interesting implications for the future of Weavers Way. What role do we want to play in the wider Philadelphia urban farming and local and healthy food revolution?

### Northwest Philadelphia

On an even more local scale, Northwest Philadelphia continues to be a desirable place to live, with some of the safest and most diverse communities in Philadelphia. Weavers Way Co-op continues to be a mainstay in the neighborhoods of Mt. Airy and Chestnut Hill. Our decision in 2010 to expand into Chestnut Hill with a second store was a strategic move to serve a wider community more conveniently. With the closing of Caruso’s Market, we knew people would be looking for a place to buy healthy food in Chestnut Hill.

Life is not static, though. The Co-op’s position as a popular food-buying destination in Chestnut Hill could be threatened with the FY 2015 opening of Fresh Market at the old Magarity Ford location at 8200 Germantown Ave. A second threat to our success in both Mt. Airy and Chestnut Hill is our lack of easy parking and our relative challenge in accommodating delivery trucks from our vendors.

On the opportunity side of the equation, we see potential in the following:

- The Chestnut Hill Business Association is recruiting unique vendors.
- Opening of Weavers Way Next Door, a health and beauty product destination that will fill the need for a HABA/wellness store in Chestnut Hill.
- The Mt. Airy Village concept continues to grow with the recent addition of the Weavers Way Across the Way storefront at 608-610 Carpenter Lane and the renovation of the main Co-op at 559 Carpenter.
- Cooperative needs in other Northwest Philadelphia communities could provide the Co-op with opportunities to extend its reach into other parts of this region.
- Prepared foods sell extremely well in both stores, reflecting a national trend toward eating out or eating food made by others as opposed to cooking at home.

## Weavers Way Co-op Today

The past five years have been formative ones for Weavers Way, with the organization seeing many changes. Overall, Weavers Way Co-op members appear to feel that the Co-op is meeting their expectations and living out the organizational mission. In a December 2012 survey, more than 97 percent of 1,400 members who took the poll (out of 5,000) reported that the Co-op is building a sense of community, having a positive influence and promoting environmental stewardship. Stakeholders outside the organization recognize our leadership, as evidenced by Weavers Way managers serving as consultants to emerging local co-ops, and by Weavers Way being asked to host the Consumer Cooperative Management Association's 2012 national conference.

Financially, Co-op sales have been on the rise over the last four years. In 2009, prior to the opening of Chestnut Hill, total store sales were at \$8.5 million; in FY 2013, sales topped out at \$17.2 million. The Co-op did 300,000 more transactions (member and non-member) in 2012 than in 2009.

This revenue growth happened much faster than anticipated, and has been one of the challenging factors in the assimilation of the new store. These are good problems to have, and present opportunities for synergy and efficiency. Bulk foods, produce and Fair Trade products showed the most growth in sales over the past year.

While the Co-op continues to look for ways to increase sales, it also seeks to create a stronger financial position by accumulating a higher cash balance and reducing its debt-to-equity ratio. Reducing debt in addition to boosting sales would put the Co-op in a better position to manage its debt prudently.

In addition to sales growth, the Co-op saw a growth in membership, with the total number of member households now over 5,000.

The Co-op has doubled the number of staff in the last four years to a total of 152. Staff satisfaction remains high and our staff turnover rate of 26 percent is well below the 47 percent grocery industry average.

We have made adjustments over these past years. Along with the opening of the Chestnut Hill store, after careful consideration, the Co-op closed its West Oak Lane store. The working member requirement became optional for the first time in more than 30 years. The Mt. Airy store underwent renovations in the summer of 2012 and the pet supply and health, wellness and beauty departments were combined into Across the Way.

On a people and organizational-culture level, the changes at Weavers Way have resulted in new and different ways of working. At the same time, at nearly 40 years old, the organization is experiencing natural turnover involving beloved longtime staff. Several veteran staffers left the organization after many years of service to the Co-op and the community. Our interviews and meetings revealed that in many ways, the changes at the Co-op provide many members with mixed feelings — of nostalgia, but also optimism for a future as a new and improved version of its old self.

## PLANNING THEMES

As you will see in the next section, our strategic plan and resulting GOALS focuses on four areas: Growth and Expansion, Internal Operations, Member and Community Engagement and Farms. Before we get into the specifics of these areas, we want to share five THEMES that emerged across the focus areas. These themes showed up everywhere and invite reflection: Identity, Growth, Membership, Efficiency and a fifth that the committee places a high value on, Diversity. Each of these emerged for consideration as we dived deep into the specific operational considerations that are the backbone of the plan itself.

## Identity

One of the biggest questions that emerged as we began to solicit ideas for the next five years of the Co-op was, “What is our identity as Weavers Way Co-op in 2013?” Weavers Way is not alone in asking this question. Many co-ops around the country were founded in the 1960s and 1970s; they have grown and changed over the decades and now find themselves looking like very different organizations than what they started out as. The changes in many co-ops have been both subtle and striking. Large buildings with fancy facades have replaced small, bare-bones storefronts, cutting-edge refrigeration cases now do the job ice and coolers once did and tiny staffs augmented by volunteers have evolved into full-fledged work forces with health insurance, vacation and professional development.

Across all the focus areas, we found the issue of identity coming up time and again. Concerning organizational expansion, there is often a fear that growth will dilute our core organizational values and that we will begin to resemble a corporation rather than a cooperative. Identity also came into play as we saw the need to acknowledge the size and complexity of the organization we have grown to be and to implement systems to reflect that (Internal Operations). Additionally, while the farms are a relatively recent addition to the Co-op, we realized that they have become a large part of our identity. Did you know that Weavers Way cultivates more acres of farmland in the city of Philadelphia than any other organization? How does the fact that we now grow some of our own food fit into our strategy? Can we afford to be farmers?

The issue of identity involves our self-image but also how we are viewed by our members and the community that we serve. The conversation about who we are and how we see ourselves was enriched when we invited community partners to come into our planning process and share how they see Weavers Way and the role they envision us playing in the future. It is our hope that from this process a more shared, collective organizational identity has emerged and will continue to be defined in the next five years.

## Growth

Reviewing the strategic plans of the past 20 years revealed that questions of growth — “to grow or not to grow, and if to grow, how to grow?” — have always been on the table. This insight was interesting since, when you ask people about growth, they feel this is the first or most important time ever for the Co-op to grapple with it.

One of the most prominent things that stood out in talking with various Co-op stakeholders was the tension between fear and skepticism about growth and the desire to grow. Weavers Way has always been an organization on the move that is growing and evolving. So the questions we found ourselves asking this time around, and on the heels of opening Chestnut Hill, are, “Do we keep growing?” and if we do, “How do we grow to become more of who we are in reaching more individuals, organizations and communities?”

The types of growth suggested to us were many and varied. Expanding to a third store was a common theme, but so were other ideas like expanding prepared foods, opening a café, buying a warehouse or expanding to include other lines of business (e.g., beer). As we explored the ideas, we realized they were predicated on two other types of growth, increasing our profits while simultaneously reducing our debt and strengthening the systems and infrastructure in place to support a larger and more complex organization.

The theme of growth also wove through the other categories, including increasing farm productivity and profit, growing our membership and increasing our impact on the community and in the local cooperative scene.

## Membership

Membership was another theme that emerged across all categories. Members are Co-op owners and financial contributors, but they are also the lifeblood of the stores and the communities that surround them. For many, membership is the essential element that makes a co-op a co-op. Others in our community want access to healthy food but membership is not so important. So membership brought up issues of identity, historical assumptions and an invitation to creatively challenge our thinking. Generally, for membership, there are two basic desires: to increase our membership base and to create members who are engaged in the Co-op on many levels.

One of the goals in having a third store would be to expand our membership to include more individuals from other communities in Northwest Philadelphia. Streamlined internal systems could support a larger membership base and help to maintain the resonant and fun culture that sets the Co-op apart from other grocery stores. One of the challenges in doing this is keeping a close-knit community feel within a larger membership. Through working membership, strong committees, farm activities and community programs, we hope to keep members connected to all facets of the organization and to each other in a way that provides a cohesive Weavers Way membership as well as strong communities within Northwest Philadelphia. Questions of membership also led us to consider and discuss our relationship to our non-member shoppers and community stakeholders.

## Efficiency

During a recession and in the face of the problem of successful growth, it is only natural that a theme running across our plan is efficiency. It is not necessarily a glamorous theme born out of inspired visioning, but it is a clear need that emerged in many different parts of the plan. With the additional locations and farm operations, Weavers Way is now an enterprise, not simply a single-store operation. At this point in our organizational evolution, there are new and exciting opportunities for streamlined and more efficient ways of doing things that wouldn't have been needed, or possible, in the past. With more staff, the need for clear and efficient decision-making, effective communication and integrated training become more possible and important.

Streamlined systems and processes will provide us with the ability to grow in the direction we choose. It will also help us reduce our financial obligations and focus our efforts where they will be most effective, whether it be efficient committee structure for member engagement, a tighter business model in place at the farms or clearer partnerships with Weavers Way Community Programs, our community partners or other local co-ops.

## Diversity

Weavers Way has always strived to reflect the community it serves. We are blessed to exist within a community that is very diverse by almost any measure. That said, serving the divergent interests and needs of a modern urban setting is a challenge. We are committed to remaining mindful of our core commitment to this important value. The growth in staff and expansion into Chestnut Hill has revealed some interesting trends and opportunities for socioeconomic diversity. In this planning process, we challenged our traditional thinking and worked to identify unconscious bias that our goals may have revealed.

A second way we thought about diversity considered the array and "diversity" of our product and services. How many kinds of blue cheese should we offer? At what point is variety and an array of choices inefficient? Who decides how many brands or kinds of a particular product? Do we offer different things at the different stores? What is our strategy in concerns such as this?

In the next section, we will go through each of the focus areas with a statement of the vision, a series of goals and our preliminary thoughts on actions and measurements. Actions and measurements will be refined into the Operational Plan that guides the budget and activities of the organization. That plan is a separate process that is the responsibility of the general manager. In some areas, these actions are continuously under way, as a strategic plan is not static but reflects strategic thinking in action and provides continuity for the organization. There are other areas where this process has highlighted new areas for attention, or helped to rearrange priorities.

## FOCUS AREA ONE: GROWTH/EXPANSION

### CONTEXT FOR GROWTH/EXPANSION

Our discussions in this focus area revealed the following trends and reflections. We know we have sufficient overhead to support additional operations such as, eventually, a third store. Over the months of discussion, our dialogue evolved from “third store, yes or no?” to “third store, likely but when, where and how?” Along with this bricks-and-mortar question, our interviews revealed interest in a more nuanced view of expansion such as in product lines or offerings, in expanding our impact as consultants to other co-ops, in addressing the interest we receive from other communities for a Weavers Way Co-op or partnership with Weavers Way. This last point is a good example of consideration, whether we help to create our own competition by supporting other co-ops in nearby communities (e.g., Roxborough) or if we do it ourselves.

We took a hard look at our own financial health and put fiscal discipline as paramount for ensuring any sustainable growth. So our commitment is to pay down debt while we explore expansion, and to find other lines of business or products that we feel we can bring in profitable revenue.

After 40 years of operation, Weavers Way is a recognizable, trusted brand. How can this be used to support expansion and growth in ways other than opening a store? Recently, we have experimented with putting our own label on products we endorse, such as organic rice and Fair Trade coffee, as well as local producers we have relationships with and who are neighbors, such as Avenida’s prepared foods. This effort may provide further opportunities for us.

Further questions that relate to growth and expansion include: Do we grow our employee base, and what is the optimal profile for this — part-timers, full-timers? How do we capture more of our members’ “food wallets” by increasing the amount of shopping they do with us? Will more members result in more sales?

### “SAMPLE QUOTES FROM INTERVIEWS”

Add a professional kitchen to MA store and have an area for members to eat and talk.  
Look for third location.

Start a bakery and pizza oven in Mt. Airy or Chestnut Hill.

I want a Weavers Way Across The Way Too in Chestnut Hill. They could sell supplements, body care and upscale general merchandise.

Start planning for a third Co-op location.

I live in Chestnut Hill and have been a member of Weavers Way since its store opened there. My suggestion is that the Weavers Way Co-op in Chestnut Hill sell beer for takeout. We have many great local breweries and I think that selling beers from these breweries (as opposed to international or “macro” beers like Budweiser and Miller) would fit within the values of Weavers Way.

Brand more products: Pickles, milk, pretzels, rice, etc.

# VISION

Weavers Way will grow in order to be a stronger and more efficient organization, to increase our impact in the community of Northwest Philadelphia, support local food and to grow the local cooperative economy. We will work to reduce our financial debt in an orderly and smart way, holding ethical and accountable financial practices paramount.

# GOALS

## GOAL 1

### Accelerate the payment of organizational debt.

#### Suggested Tactics:

- A.** Focus on paying Valley Green debt in the next 18 months (approx. \$542,000). **A.** By FY 2014: \$365,000  
By FY 2015: \$182,000
- B.** Increase sales by 5% each year (increase basket size: 70% of sales are made to 30% of shoppers). **B.** Increase basket size by \$.50 in a year.

## GOAL 2

### Explore the possibility and opportunities for opening a third Weavers Way location in another community of Northwest Philadelphia.

#### Suggested Tactics:

- A.** Conduct a CAT study to see where our members are coming from. Then conduct a market study to determine viability of a third Weavers Way store. (Propose for budget year 1 — approx. \$10,000-\$15,000.) **A.** CAT study: Q1 FY 2014  
Market study: Q2 FY 2014
- B.** Seek member feedback on third store and form a committee consisting of the Outreach Coordinator and Membership Coordinator to revisit how this was done in previous years and implement it (home meetings, votes, etc.). **B.** FY 2014-FY 2015
- C.** Open third store in Philadelphia. **C.** FY 2016-FY 2017

## GOAL 3

### Identify additional Weavers Way lines of business or internal expansion opportunities for the organization.

#### Suggested Tactics:

- A.** Solicit input from key stakeholders around other lines of business or internal expansion ideas (e.g., a community “brainstorming” series of sessions with members, staff, Weavers Way board and the community). **A.** Ongoing: 2013-2014

Examples:

- |   |            |
|---|------------|
| a) Opening “Weavers Way Next Door” in Chestnut Hill   | a) FY 2014 |
| b) Explore opening up other lines of business (e.g., pharmacy, restaurant, juice bar, beer, etc.).                                | b) Ongoing |
| c) Expand the Weavers Way brand product line from five to ten products (e.g., baked goods, repack of oils, prepared foods, etc.). | c) Ongoing |

## FOCUS AREA TWO: INTERNAL OPERATIONS

### CONTEXT FOR INTERNAL OPERATIONS

This important focus area has been an area of much reflection and discussion. With growth as mentioned above comes the need and opportunity for a review of internal operations. We know we have more employees, more department managers and more administration than we did several years ago. How can we best use this investment in jobs and people to serve the organization? How do we get different parts of the enterprise to understand and support other parts? For instance, can staff cross-train in different departments or even at the farms? This would provide variety in jobs and could also provide managerial flexibility. How do we best unleash the potential of our diverse and growing workforce, using them to spread the message of co-ops and democratic involvement while unleashing their creativity on behalf of Weavers Way? What is the role of a manager in this more dynamic environment of multiple stores and farms?

With two stores we have opportunities to consider our relationships with suppliers and vendors. We are a larger operation now. What is possible for us with our stakeholders (suppliers, producers, etc.) that may not have been possible five years ago when we were smaller and recovering from a financial crisis? What is the nature of our relationship with our suppliers — how do we partner in such a way that they can make a sustainable wage while we can make a sustainable profit? Are there internal structures and processes that can help us realize cost savings that we can then apply to our overhead (such as the farms) or return to our members?

### “SAMPLE QUOTES FROM INTERVIEWS”

I would like to see the Co-op look at internal structures, in order to improve communication within departments, among departments and between management and staff.

Internal Operations — now that we’re growing, we need to think about how to grow operations to meet our new size.

Department/Store Meetings would get information disseminated to staff better, and store meetings would help get staff to know one another. Info from store meetings can be passed to staff who were not there at dept. meetings.

Better communication among management and from management to staff.

Identify systems to alleviate chaos. Better decision-making processes

Bring in facilitators to train management and staff to help with this process.

The Co-op should continue great customer service and friendly staff.

# VISION

Utilizing 21st-century technologies and business practices, Weavers Way will become a more efficient, goal-oriented organization, with a process for two-way communication that will serve as an industry model.

# GOALS

## GOAL 1

### Assess what internal operations need to be improved.

#### Suggested Tactics:

- A.** Develop the first two Cross-Department Teams (“Hot Teams”) to address key issues. (Possible issues include margin management, logistics and deliveries, product mix and purchasing.) **A.** FY 2014
- B.** If we expand to a third store, explore the possibility of hiring an operations manager at that time. **B.** FY 2015-FY 2016
- C.** Implement solutions to other key strategic challenges such as the method for receiving deliveries and leasing a larger or shared warehouse, etc., that could be explored through the use of cross-enterprise teams. **C.** FY 2014
  - a)** Utilize the existing warehouse space to take better advantage of deals.
- D.** General manager will conduct monthly staff open forum meetings to be attended by other key members of the management team. Stores and admin will send representatives to these meetings to look at ways to improve operations and customer service. **D.** FY 2014

## GOAL 2

### Research and implement best practices for exceptional organizational communication.

#### Suggested Tactics:

- A.** Design a new communications cadence and hold senior management accountable for it. **A.** Ongoing
  - a)** Implement monthly department meetings for all store departments. Provide agendas, expectations and goals for all departments.
  - b)** Improve communication among buyers by establishing monthly face-to-face buyer meetings.
  - c)** Further educate buyers on Weavers Way product philosophy and hold buyers accountable for this philosophy.

- d) Conduct a thorough analysis of all products offered by Weavers Way to ensure that they meet the criteria of our product philosophy. Develop and implement a process for removing and replacing products that fail to meet our criteria and communicate these changes effectively to members and shoppers.
- e) Research and implement a new method for two-way internal communication that will better engage staff with management to increase communication vertically.
  - a. Invite senior staff to finance meetings.

**B.** Develop a performance-management system and institute a talent review process.

**B.** FY 2014-FY 2015

- a. Train managers in performance management.

### GOAL 3

### **Design and organize a management-training program that focuses on management development to increase professionalism and accountability.**

#### **Suggested Tactics:**

**A.** Use cooperative principles as a guide for conduct and professionalism.

**A.** Beginning FY 2014-FY 2015; rollout FY 2015-FY 2016

- a. Co-operative principle training for all staff and committee chairs.
- b. Conduct ongoing co-operative reading and discussion groups.
- c. Send staff to co-operative training programs.
- d. Have a part time co-op principle trainer on staff.

**B.** Management will be held to high expectations of treating each other and their staff with trust, respect and appreciation. They will set an example for staff and provide an environment for sharing ideas, concerns and talents. This value will guide decisions about promotion and development.

**B.** Ongoing

**C.** Invest in training and development of store and department managers in key managerial areas: leadership, finance, administration and technology; and develop department managers who are actively engaged in the financial management of the Co-op and in staff development.

**C.** Ongoing

**D.** Explore regional employee exchange consortium with other area co-ops; implement an area-wide customer-service training program.

**D.** FY 2014-FY 2015

- a. Explore funding opportunities

**E.** Set expectations among department staff concerning industry /product knowledge.

**E.** FY 2014-FY 2015

**F.** Increase customer service with an engaged, knowledgeable staff who serve as a resource to customers on product philosophy and information.

**F.** FY 2014-FY 2015

## GOAL 4

### Increase staff development opportunities to maintain low turnover and to improve the diversity of the Co-op's management team.

#### Suggested Tactics:

- |  |                                    |
|--|------------------------------------|
| <b>A.</b> Establish mentorship program for high-value hourly staff.  | <b>A.</b> FY 2014                  |
| <b>B.</b> Conduct quarterly "Open Book" finance meetings to improve hourly staff's knowledge and understanding of the Co-op's finances.                | <b>B.</b> FY 2014-FY 2018          |
| <b>C.</b> Develop the next level course for internal customer-service training (CS 102).   | <b>C.</b> FY 2014                  |
| <b>D.</b> Design a formal program for training entry-level staff in specialty skilled jobs (e.g., meat cutting, cheese specialist, wellness products). | <b>D.</b> FY 2014; rollout FY 2015 |
| <b>a.</b> Implement the program  |                                    |
| <b>E.</b> Prioritize management positions to be filled by internal candidates.   | <b>E.</b> FY 2014-FY 2015          |
| <b>a.</b> Interview at least one internal candidate before posting positions externally.   |                                    |

## GOAL 5

### Clarify relationship between Weavers Way and Weavers Way Community Programs.

#### Suggested Tactics:

- |   |                   |
|---|-------------------|
| <b>A.</b> Weavers Way will support and participate in WWCP's own strategic-planning process that will examine the relationship of Weavers Way, WWCP and the farms. (This process will hopefully help these entities overlap rather than further distinguish them as separate entities.) | <b>A.</b> FY 2014 |
| <b>B.</b> Weavers Way Membership and Marketing departments will embrace immediate and short-term WWCP events.   | <b>B.</b> Ongoing |
| <b>C.</b> Weavers Way and WWCP will cross-promote events when appropriate.  | <b>C.</b> Ongoing |

## FOCUS AREA THREE: MEMBER AND COMMUNITY ENGAGEMENT

### CONTEXT FOR MEMBER AND COMMUNITY ENGAGEMENT

People are busy, Weavers Way is busy. People crave community and co-ops represent community. Herein lies one of the most interesting strategic questions for Weavers Way. We are more than a grocery store, and we compete to make the money that supports our broader mission.

Membership is the essence of Weavers Way Co-op. Since it was created and staffed by members for much of its history, the role of members in Weavers Way is a topic of much discussion. In recent years, Weavers Way, along with many of its contemporary co-ops across the country, relaxed working requirements to enable a wider variety of relationships to the organization. We now have working members, non-working members and non-member shoppers. In the next years, we will further define these categories in an effort to deepen our relationship to our consumers, and community stakeholders.

We also want to build on our position as a centerpiece of the community. We know people care about Weavers Way. We also know that the demographics of our membership have changed — we have grown in members, we are more diverse in many ways and we cover more ground geographically. We have a need for the work contribution members can provide, and see opportunity for getting better at utilizing members' interest in contributing to Weavers Way to make these efforts productive for membership, the organization and the broader community. In the past, there have been many active working committees. We believe the committee structure can provide valuable ways for deepening the relationship between members and the Co-op, and for supporting Weavers Way in very important ways.

#### “SAMPLE QUOTES FROM INTERVIEWS”

Increase work hours and increase discounts.

I want more composting/recycling education at the store and more education about this topic.

Making an effort to re-engage membership in the actual core process of the Co-op — this is something that distinguishes our co-op from other available food stores — we are of the people, by the people and for the people, our members are more than “consumers” — they are owners and co-operators in a join enterprise.

In general, its efforts should focus on ways to enhance and encourage community-mindfulness ... increased working membership, host community events, etc.

Engage lower-income areas; look more closely at what went wrong in Ogontz. Maybe there is an alternative model to making this work (interest in a lower Germantown store), like all bulk/no packaging or Produce Junction.

Make prices more affordable.

Member workshops — encourage more of these, also to help foster relationships among members — focus on self-sufficiency, using herbs, farming, foraging.

# VISION

Upon its foundation as a thriving and values-driven marketplace, Weavers Way will nurture a healthy spirit of community within, and around, its membership body by cultivating opportunities for vibrant, creative, open and democratic social and civic interaction. The Co-op will demonstrate social responsibility and promote collective well-being by serving as a nexus in the community at large for the exchange of ideas, innovation, knowledge and skills.

# GOALS

## GOAL 1

**Weavers Way will invite and embrace member participation in the social organization and culture of the Co-op, creating a hospitable environment that facilitates robust member engagement.**

### Suggested Tactics:

- A.** Audit member materials for tone to ensure they consistently express warmth and support. **A-D:** Ongoing
- B.** Manage the bulletin boards in each store to better serve exchanges of information among members and staff.
- C.** Develop interactive mixed-media reference libraries focusing on subjects relating directly to co-op culture.
- D.** In order to serve as shared resources for both members and staff, conduct satisfaction surveys following cooperator work shifts to measure the quality of working member experience.

## GOAL 2

**Allocate permanent comfortable and attractive spaces for members and staff to gather in order to facilitate community engagement.**

### Suggested Tactics:

- A.** Make building exteriors more attractive and inviting. Add planters, vertical gardens and outdoor lighting. **A.** FY 2014-FY 2016
- B.** Add exterior furnishings to enhance/expand on existing seating arrangements outside both stores. **B.** FY 2014-FY 2016
- C.** Find a space in Mt. Airy for member use for events, classes, etc. **C.** FY 2014-FY 2015
- D.** Find a space in Chestnut Hill for member use for events, classes, etc. **D.** FY 2014-FY 2015
- E.** Add a demo kitchen or workshop space. **E.** FY 2016-FY 2018

## GOAL 3

### Increase Weavers Way membership, especially working membership.

#### Suggested Tactics:

- A.** Conduct working member drive to increase working membership. **A.** Ongoing
  - a. Goals for next five years: Increase working membership by 5% each year of current number of working members (i.e., currently there are 1,700 working members; next year there will be 85 more working members).
- B.** Set up Working Member Program Task Force to examine WMP from soup to nuts. **B.** 2014 review, implement 2015 after debt is paid down at VG
  - a. Set up committees to explore “working member and super membership” program, also known as a tiered program:
    - i. Member not working
    - ii. Member working 4 hours each month = x% off
    - iii. Member working 4 hours each week = y% off
  - b. Provide for work in-store and outside with approved volunteer organizations.
- C.** Expand membership/market reach to reflect the larger community of Northwest Philadelphia. **C.** FY 2014
  - a. Explore a discount system for SNAP and others on public assistance (research Greenstar, Onion River programs).
    - i. Implement program FY 2015
  - b. Conduct co-op model education specifically targeted to reach “co-op deserts” in Northwest Philadelphia.
  - c. Set measurable goals for bringing co-op education to the larger community (e.g., visit four flea markets, three churches, etc., per year).

## GOAL 4

### Revitalize engagement structure as an opportunity for meaningful member co-op engagement.

#### Suggested Tactics:

- A.** Develop definition of Weavers Way clubs/affinity groups (as opposed to committees) and support them through promotion and Co-op resources. **A.** FY 2014
- B.** Invite and encourage members to form committee/clubs as a means to organize social action on a specific issue or theme. **B.** FY 2014

- a. Members will file a formal request to establish a Weavers Way committee, to be approved by management.
- b. Every committee will be required to articulate a statement of purpose tied to a Weavers Way End.
- c. Every committee will be asked to set specific goals, and to meet a minimum of four times per year in pursuit of said goals.
- d. Every committee will be asked to publish a yearly report on its activities and its progress toward its goals.
- e. Approval will allow for the allocation of a committee budget intended to support and empower committee actions.
- f. Every committee will include a staff liaison to ensure organizational support for committee actions.

## GOAL 5

### Accelerate equity payments.

**A.** Weavers Way Finance Department will work with Membership, Outreach, Marketing and Communications to increase the number of members who accelerate their payment of equity through the Pay It Forward campaign.

**A.** Set goals for next five years by the end of FY 2014 Q1 (10% to 20%)

## GOAL 6

### Increase cooperative membership through support of local food co-ops.

#### Suggested Tactics:

**A.** Explore options for a co-op startup team with the Philadelphia Area Cooperative Alliance or form an internal Co-op startup team to assist other communities to start food co-ops.

**A.** FY 2014

a. Determine a fee-for-service model versus what is done for free.

**B.** Educate and publicize the philosophy and benefits of a Co-op business model using existing and new media.

a. Align and support the Marketing department and staff development initiatives.

## GOAL 7

### Create a partnership strategy to guide our partnering decisions with other local organizations to be more proactive and focused. (Essentially, who are our key partners and what do we do with them strategically?)

#### Suggested Tactics:

**A.** Determine parameters for partnerships. For example, geographic considerations (Northwest Philadelphia), alignment with co-op mission/vision, etc. How do we focus our efforts?

**A.** FY 2014-FY 2015

## GOAL 8

### Issue advocacy coalition.

#### Suggested Tactics:

- A. Use existing committee structure, in partnership with WWCP, to determine issues important to staff, membership and community. (Involvement and coordination with WWCP would depend on the issue.) A. FY 2013-FY 2014 (potentially ongoing)
- B. Establish review process of advocacy issues. B. FY 2014
  - a. Convene skilled stakeholders and choose representatives.
  - b. Refine our collective point of view of what Weavers Way stands for. This requires both internal discussions and discussions with our stakeholder partners including suppliers, community organizations and government.

## FOCUS AREA FOUR: WEAVERS WAY FARMS

### CONTEXT FOR FARMS

Weavers Way runs two farms and is currently the largest cultivator of urban acreage in Philadelphia, with 5.5 acres under management. This has coincided with the growth in interest in urban farming and gardening in Philadelphia. People who know we have farms love the fact that our Co-op supports local farmers and is in fact, a local farmer. Many other people aren't really aware of our farms and the role they play in our operations.

The farms play an integral role in our education and outreach efforts and inspire the community to realize that the many empty lots in Philadelphia can be farmed and the food produced sold or kept by the people farming these lots. Weavers Way Farms do not make a positive net income. For five years, we have worked to make the farms break even, but to date this has not been successful. For these reasons, it is important to be clear about our strategy as it relates to farming in general and the Weavers Way Farms in particular. As a result of our process, we reasserted our commitment to the Farms, identified ways to raise the profile of the farms and accepted that we need a way to better manage the financial realities of this part of our overall Weavers Way enterprise. We feel there are opportunities for better collaboration with Weavers Way Community Programs (a separate organization from Weavers Way Co-op) in this area that we will explore.

### “SAMPLE QUOTES FROM INTERVIEWS”

The Co-op should do even more farming.

The farms ... I don't know if we are doing it well. I want them to make more money. They need more support from Weavers Way.

We should have farmstands throughout Northwest Philadelphia

I want more Weavers Way farm products available in the stores.

Farms are our differentiator!

I think the Weavers Way farms are great but we should not do any more unless someone can figure out how to make a profit doing this. I don't think we can ever make money doing this; we will always just break even. What we are doing is great, but we can't expand it. We wouldn't want to commit any more money to do it. We are not a farm that runs a store.

We should be advertising and promoting the farms more than we do.

## VISION

Weavers Way will continue to grow as the No. 1 urban farming organization in Philadelphia with financially sustainable farms that provide opportunities for education about farming.

## GOALS

### GOAL 1

**Weavers Way will affirm commitment to the organization's farms.**

#### Suggested Tactics:

- A.** Utilize the store's administrative resources for farm support. **A.** FY 2014-ongoing
- B.** Marketing and Communications will conduct an active marketing campaign to psychologically connect the Co-op, community members and Weavers Way staff to the farms.
  - a.** Institute cross-departmental meetings with the farmers and store departments.
  - b.** Explore creative ways to engage staff at farm (2 hours at farm per staff member).
  - c.** Six orientations/management meetings at the farm.

### GOAL 2

**Conduct a business-model analysis.**

#### Suggested Tactics:

- A.** The analysis will look at business aspects but also things like the apprenticeship program, etc. **A.** Winter 2013-2014
  - a.** Explore merging the farms with Weavers Way Community Programs or another nonprofit for fund-raising purposes.
  - b.** Look at the efficiency of the structure of farm labor.
  - c.** Explore turning Awbury into a CSA or selling everything we produce at Weavers Way.
  - d.** Explore leasing farmland to a subcontractor to farm and provide food for us, or contract production. Explore beginning an urban farm co-operative that owns land and runs urban farms.

- e. Explore feasibility of having fallow land.
- B. Form a Weavers Way management committee to explore alternative farm structure models and make a recommendation to Weavers Way.
  - a. Hire farm business consultant to facilitate decision-making (\$5k/fund-raiser?).
- B. Implementation: Growing Season FY 2015

### GOAL 3

#### The farm will explore existing ideas for increasing revenue.

##### Suggested Tactics:

- A. Season extension techniques, fallow land, etc.
  - A. FY 2014-Ongoing  
\*10% increase in revenue goal for Year 1.  
\*Will reassess percentage after business analysis.
- B. Value-added products, CSA subscriptions service, "High 5" type program for farm products.
- C. Budget \$20,000 year to increase farm funds

### GOAL 4

#### Increase member and community participation with the farms.

##### Suggested Tactics:

- A. The farm committee will provide opportunities for our membership to better connect to the farms, as well as providing the farms with better support and fund-raising.
  - A. FY 2014-Ongoing
- B. Volunteers will assist with tracking finances, fund-raising, harvests, and market/CSA pickup.
- C. Provide education to apprentices and interns through Year 1, assess program Years 2-5.

## APPENDIX

### A Note on Our Process

In the fall of 2012, Weavers Way was ready to embark on a new visioning and strategic-planning process that would provide direction for fiscal years 2014-2019. Between 2010 and 2012, Weavers Way had been assimilating and adjusting to the expansion into Chestnut Hill and the resulting complexities of being a two-store, two-farm operation. Throughout this process, Weavers Way took the time to reflect and consider the operational challenges and opportunities this growth presented for the organization. By fall 2012, General Manager Glenn Bergman judged that the organization was ready to imagine the future and initiated a strategic-planning process.

Glenn invited Fran Johnston and Lindsey Bingaman from the Teleos Leadership Institute to guide the organization through the process since Teleos had partnered with the operational review the previous year. Teleos designed a cooperative, inclusive, dialogue-based strategic-planning process for Weavers Way to ensure that the way the organization set goals for the future represented Co-op values, and with an eye for what would maximize buy-in in the future. Fran and Lindsey are Co-op members and Lindsey is a recent former employee.

What is a strategic plan? A useful strategic plan is a document that is a result of a process of careful and inclusive strategic visioning coupled with strategic thinking. A strategy-making process captures what the organization knows about itself (internal considerations such as strengths and challenges) and its environment (external considerations like competition, collaborative partnership opportunities, demographics, trends, etc.). These reviews and scans are then synthesized into a vision of the direction that the organization should pursue. In the case of Weavers Way, the strategic plan/vision is to cover the next five years.

The first step was to decide who would work on the plan. Glenn put out an organization-wide invitation to see who was interested in joining the Strategic Planning Committee. The team that assembled was a good mix of young Co-op employees as well as some senior staff members who had been working at the organization for a long time. While the committee evolved and changed throughout the nine-month process, a core team carried the committee through the planning process and helped bring to fruition the document you are reading now.

Along with providing the strategic plan itself, this process has also been influential in awakening organizational visioning for the future and aligning those visions so Weavers Way can move into the next five years confident about who it is and what it will undertake next. The process was designed as a professional-development experience itself for the committee members and those we spoke with — more than 100 individuals were asked to think “strategically” about the Co-op, and to put their thoughts, desires and imagination to work on its behalf.

### Here is a breakdown of our process:

## What is a STRATEGIC PLAN?



A useful strategic plan is a document that is a result of a process of careful and inclusive strategic visioning coupled with strategic thinking.



### Phase 1: Taking Stock of Weavers Way (September-November)

The first step in the strategic-planning process was to solicit feedback from the myriad stakeholders at Weavers Way. One of the biggest ways the strategic-planning process at a co-op is different from this same process at a traditional corporation is in the number of vested groups consulted along the way.

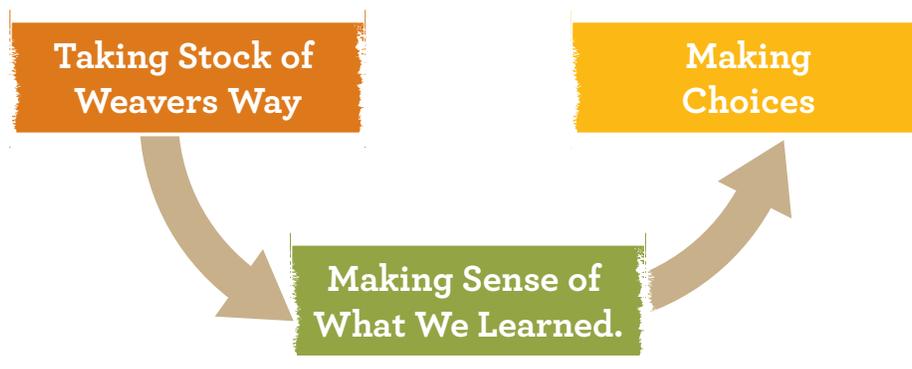
**Weavers Way Leadership Team and Board of Directors:** Two of the groups we looked to first for input were the Weavers Way management leaders and the board. Each strategic-planning committee member was assigned people from these two groups for one-on-one visioning interviews concerning what they would like to see for the future of Weavers Way Co-op.

These two groups also gave input through two separate SWOT analysis meetings. In this analysis, the group discussed and debated the internal (Strengths and Weaknesses) and external (Opportunities and Threats) environmental factors that were or could influence the success of Weavers Way in the next five years. The Strategic Planning Committee joined a Tuesday Weavers Way leadership meeting where they engaged with the leadership in an organizational SWOT analysis and integrated the SWOT analysis done by the board in a retreat earlier in the year.

**Weavers Way Staff and Co-op Members:** While the Strategic Planning Committee was doing interviews with the leadership team and the board, we also engaged Co-op staff and members by soliciting their input via email and having in-store feedback forms available for them to share their visions for the future of the Co-op. Additionally, a committee representative held feedback sessions for staff in each store and sought member feedback at several community events.

**Community Organizational Partners:** Finally, the Strategic Planning Committee sought input from the important and varied Co-op community partners. This was done through a community stakeholder event held in 555 Carpenter Lane. Key organizational community partners attended the open house and joined a running conversation about Weavers Way's position in the community, gave input in a SWOT analysis and shared ideas they had for continued partnership in the future.

# Prepare the Process



## Phase 2: Making Sense of What We Learned (December-February)

Phase Two of the strategic-planning process consisted largely of evaluating the feedback we had collected from the various stakeholders, finding patterns in what people were envisioning for the future of Weavers Way and forming themes that would become the basis for what we included in the plan. This process was both an objective thematic analysis of the interview, group meetings, member feedback input, etc., data as well as an emotional, intuitive sense-making process. What did people seem to want from Weavers Way? What was the nature of their relationship with Weavers Way historically, now and into the future?

To streamline this part of the process, we formed a subcommittee of people from our larger strategic-planning committee. The subcommittee would report back to the full committee on a regular basis to engage them in brainstorming and ensure directional alignment.

As we worked on this process, we also stayed connected to the Weavers Way leadership team and board by occasionally sharing our emerging themes and preliminary findings and summoning responses from them on what was emerging for the plan.

This phase of the planning process culminated with a Weavers Way management retreat at Teleos Leadership Institute in March. The Strategic Planning Committee and the Weavers Way leadership team came together to further define the major themes that had emerged and to outline initial high-level goals for each theme. This interactive meeting was important not only for the ideas that emerged from the work of the meeting, but also for a process of inclusion and buy-in to the ultimate strategic vision and plan.

## Phase 3: Making Choices (March-May)

Following the retreat, the Strategic Planning Committee continued to meet to deepen the thinking and visioning for each theme. The subcommittees resumed meeting to adjust and add to the goals that had been outlined and then reported out and get feedback from the larger group. During this time, our group worked closely with Co-op Chief Financial Officer Michael McGeary to understand the Co-op's finances, which helped us prioritize our goals and identify which ones might or might not be financially feasible for the current plan.

Once our goals for each theme were set in place, we formed new small teams, consisting of Strategic Planning Committee members and key Weavers Way staff members responsible for the specific areas (e.g., Farms, Membership, etc.) to brainstorm tactics that could be implemented to help the organization reach each of the stated goals in the plan. This step ensured alignment with and adjustment to the operational vision of the various staff members responsible. The final piece of this phase was the refining of the written plan and the layout done by Weavers Way's own graphic designer Annette Aloe.