Emergency Succession Plan
The Redwood Empire Food Bank
September 2026

Purpose

The purpose of this Emergency Succession Plan is to ensure continuity of leadership and operations at the Redwood Empire Food Bank in the event of an unexpected absence, incapacity, or departure of key executives. This plan is designed to maintain organizational stability, ensure critical responsibilities are covered, and support uninterrupted decision-making during times of transition.

Intent

The intent of this plan is to provide a high-level overview of each department's leadership succession strategy in the event of an unplanned or unexpected vacancy or absence. This plan identifies interim leadership coverage and outlines the organization's approach to maintaining essential functions and operational continuity.

This plan applies to the following leadership positions:

- President and Chief Executive Officer
- Chief Financial Officer
- Chief Operations Officer
- Chief Development Officer
- Chief People & Culture Officer
- Director of Marketing & Communications
- Director of Programs
- Director of Partnerships

Plan Review

This Emergency Succession Plan will be reviewed regularly and updated as needed to ensure accuracy and organizational preparedness.

Types of Emergencies

An emergency includes any unplanned or change in leadership that arises unexpectedly and affects the ability of a key executive to fulfill their responsibilities. The duration and impact of the absence may vary depending on the circumstances.

Temporary, Unplanned Absence - Short Term: An absence that is expected to last less than three months.
Temporary, Unplanned Absence – Long Term: An absence that is expected to last

three months or longer.

Permanent Change: A permanent leadership change resulting from circumstances such as death, sudden resignation, or other unforeseen separation from employment.

Key Terms

Interim: The individual designated to temporarily assume the responsibilities of a position during an absence or vacancy.

Executive Team: The Executive Team consists of the following positions: President and Chief Executive Officer, Chief Financial Officer, Chief Operations Officer, Chief Development Officer, and Chief People & Culture Officer.

Board of Directors: The Board of Directors includes the Board Chair, Vice Chair, Treasurer, and all board members.

Allison Goodwin, President & Chief Executive Officer

In the event of an unplanned absence of Allison Goodwin, the Executive who is first aware of the situation will immediately notify the Executive Team and the Board Chair. The Board Chair will be responsible for informing the remaining members of the Board of Directors.

The Chief People & Culture Officer will work in coordination with the Executive Team and the Board Chair to communicate the absence to all staff in a timely manner.

Following notification, the Executive Team and Board Chair will assess the anticipated duration of the absence and determine the appropriate course of action. Based on the anticipated duration and organizational impact, the Executive Team and Board Chair will determine whether activation of the Emergency Succession Plan is necessary.

At the time this plan was approved, the position of Interim President & Chief Executive Officer would be:

1) Paula Handelman, Chief Financial Officer

Should the standing appointee be unable to serve, the first and second back-up appointees would be:

1) Breanne Beseda, Chief Development Officer
2) Alison Smith, Chief Operations Officer

Authority and Compensation of the Interim President & Chief Executive Officer

The person appointed as Interim shall have full authority to make decisions and take independent action as the regular President & Chief Executive Officer.

The Interim may be offered:

- A temporary salary increase to the entry-level salary point of the President & Chief Executive Officer position
- A bonus during the Interim period
- No additional compensation
- How would compensation work if a Board member is the Interim?

Board Oversight

The board member(s) or board committee responsible for monitoring the work of the Interim shall be [insert name].

Communication Plan

Immediately upon transferring the responsibilities to the Interim, the Board Chair will work in conjunction with the Executive Team to notify all staff members and the Board of Directors of the delegation of authority.

As soon as possible after the Interim has begun covering the unplanned absence, Board members and the Interim shall communicate the temporary leadership structure to the following key external supports of the Redwood Empire Food Bank. This may include, but is not limited to:

- Feeding America: Cynthia Jackson, Senior Director of Member Engagement. Cynthia Jackson's contact information:
    - Email: cjackson@feedingamerica.org
    - Telephone: (312) 210 – 8654 x 6041
    - Business address: 161 N. Clark St., Suite 700, Chicago, IL 60601
- California Association of Food Banks: Stacia Levenfeld, Chief Executive Officer. Stacia's contact information:
    - Email: stacia.levenfeld@cafoodbanks.org
    - Telephone: (510) 272-4435
    - Business address: 1616 Franklin Street #300, Oakland, CA 94612

Temporary, Unplanned Absence: Short Term

A Temporary, Unplanned Absence - Short Term is defined as an absence of less than three months in which it is expected that the President & Chief Executive Officer will return to their position once the events precipitating the absence are resolved.

In the event of a short-term unplanned absence, the Board of Directors will appoint the Interim to ensure continuity of leadership and operations.

Completion of Short Term Emergency Succession Period

The decision regarding when the absent President & Chief Executive Officer will return to active leadership of the Redwood Empire Food Bank will be determined jointly by the President & Chief Executive Officer and the Board Chair. Together, they will establish a mutually agreed-upon return date and transition schedule.

Upon return of the President & Chief Executive Officer, the Interim will resume their regular position and responsibilities.

Questions regarding applicable leave laws, employee accommodations, or related employment matters should be coordinated with the Chief People & Culture Officer and/or legal counsel as appropriate.

Temporary, Unplanned Absence: Long-Term

A Temporary, Unplanned Absence - Long Term is defined as an absence expected to last three months or longer. The procedures for a short-term absence will apply, with the following additional consideration:

The Executive Committee and/or Board of Directors, in consultation with the Interim, will evaluate the need to temporarily fill the management position left vacant by the Interim during the succession period. This recognizes that, during an extended absence, it may not be reasonable or sustainable for the Interim to fulfill the responsibilities of both roles simultaneously.

Completion of Long-Term Emergency Succession Period

The decision regarding when the absent President & Chief Executive Officer will return to active leadership of the Redwood Empire Food Bank will be determined jointly by the President & Chief Executive Officer and the Board Chair. Together, they will establish a mutually agreed-upon return date and transition schedule.

Upon return of the President & Chief Executive Officer, the Interim will resume their regular position and responsibilities.

Questions regarding applicable leave laws, employee accommodations, or related employment matters should be coordinated with the Chief People & Culture Officer and/or legal counsel as appropriate.

Permanent Change

A Permanent Change occurs when it is determined that the President & Chief Executive Officer will not return to the position. Examples may include resignation, termination, death, retirement or other unforeseen separation of employment. In the event of a permanent change, the procedures and conditions outlined for a Temporary, Unplanned Absence - Long Term will apply, with the following additional actions:

The Board of Directors will appoint a committee to oversee and manage the leadership transition process. The committee will be responsible for planning and carrying out the transition to a new permanent President and Chief Executive Officer.

The Board of Directors may also determine whether outside consulting or engaging the assistance of an executive search firm is necessary to support the transition and recruitment process.

Finance Department

Paula Handelman serves as the Chief Financial Officer (CFO). The CFO is responsible for overseeing the overall financial health and stewardship of the organization, including: financial planning & strategy, budget planning/management, financial reporting, compliance & accountability, payroll, grant & fund management, cash flow & financial health, and risk management.

In the event of Paula's temporary, unplanned absence, the Finance team employees will continue to perform the duties and responsibilities associated with their respective roles to maintain continuity of operations.

The Executive Team will assess the anticipated duration and operational impact of the absence to determine whether an Interim CFO is necessary.

If an Interim appointment is needed, the President & Chief Executive Officer, in consultation with People & Culture and the Board Treasurer as appropriate, will identify the most qualified individual to assume interim leadership responsibilities. Consideration may include:

- Internal interim assignment
- Temporary delegation of duties among Finance staff

- External contracted financial support

If an employee assumes significant additional responsibilities on an interim basis, compensation options may include:

- A temporary salary adjustment
- A bonus during the Interim period
- No additional compensation

Compensation decisions will be made in consultation with the Chief People & Culture Officer and in alignment with our Compensation Guidelines.

In the event of a permanent change, we would initiate recruitment efforts to identify and hire a qualified permanent CFO.

The Finance Department consists of five individual contributors whose responsibilities collectively support accounting operations, financial reporting, grant compliance, payroll, cash management, and administrative functions. Several positions carry significant institutional knowledge and specialized processes that should be considered in succession planning and cross-training efforts.

Staff Accountant — Chappy Ramirez

Tenure: 14+ years with the organization; nearly 9 years in Finance, hired 1/09/2009

Chappy is primarily responsible for expense accounting, functional allocation, inventory accounting, government food activity, and internal financial reporting. His role provides an important link between operational activity and the organization's financial reporting. Anthony would assume Chappy's responsibilities in case of his absence.

Key Responsibilities

- Expense oversight and general ledger review: Reviews and approves accounts payable invoices for proper coding and documentation and reviews expense accounts for accuracy. Accounts Payable is the initial and primary party responsible for the data organization. Provides expense-related reporting to directors and ensures transactions posted by other staff are assigned to the appropriate general ledger accounts.
- Functional allocation: Oversees the full allocation of revenue and expenses to individual programs and activities. This process supports program-level budgeting, financial analysis, and calculation of cost-per-pound/activity metrics.
- Inventory and government receiving: Oversight of purchased inventory receipts and shipping documentation to ensure accurately recorded in the

ERP system. Performs similar reviews for government food receipts. Accounts Payable is the initial and primary party responsible for the data organization.
- Government inventory and activity reporting: Reconciles monthly activity and inventory associated with the organization's two USDA food distribution programs and prepares required reports for CDSS.
- Distribution reporting: Compiles monthly distribution poundage and participation activity for management review. This process is key to the allocation of food expense by program which is the backbone of our program cost allocation model.
- Internal financial reporting: Following the monthly functional allocation process, supports the preparation of internal financial statements and reports used by departments and management.
- Co-manages the annual year end financial audit with Anthony.

Staff Accountant — Anthony Bollock

Tenure: 6 years, hired 9/28/2020

Anthony is primarily responsible for revenue accounting, restricted/fund accounting, cash reconciliations, grant budgeting, and program budgeting, while also supporting the CFO with financial analysis and external reporting.

Key Responsibilities

- Restricted revenue/fund accounting: Tracks individual grants against approved budgets throughout the grant period to ensure expenses and distribution activity remain within allowable limits. Maintains documentation and audit trails to support grantor and annual audit requirements.
- Government grant reporting and reimbursements: Tracks expenses and activity associated with government reimbursement grants and prepares the financial reports and supporting documentation required for claims. Reviews grant documentation for compliance with reporting requirements.
- Cash and investment account reconciliations: Reconciles all cash and investment accounts. For the operating account, this includes reconciling donor database activity to the general ledger and reconciling the general ledger to bank activity.
- Grant budgets and reporting support: Develops budgets requested by the Grants team, including both straightforward grant budgets and more complex budgets requiring cost accounting and activity-based analysis.
- Program budgeting: Following approval of the annual organizational budget, translates planned activity into individual program budgets using cost-per-pound and other calculations developed through the functional allocation process.

- CFO support: Provides financial analysis and reporting support for external and management purposes.
- Co-manages the annual year end financial audit with Chappy/

Staff Accountant — Brian Sanchez

Tenure: 2 years, hired 4/09/2025

Brian is primarily responsible for payroll processing, payroll-related accounting and reporting, and restricted-revenue support. His position requires knowledge of payroll procedures, accounting requirements, and applicable labor-related requirements.

Key Responsibilities

- Payroll processing: Reviews timesheets and processes semi-monthly payroll through the organization's payroll provider.
- Payroll payments and reporting: Prepares payments for payroll-related obligations, including garnishments, HSA accounts, and retirement accounts.
- Payroll accounting: Prepares journal entries for payroll and payroll-related accruals, including month- and year-end activity.
- Payroll reconciliations: Reconciles retirement accounts, benefits statements, and other payroll-related vendor information to internal records.
- Payroll allocation and reporting: Summarizes monthly W-5 activity for payroll allocation and distribution reporting and prepares management reports regarding overtime and meal-premium activity.
- Audit support: Prepares annual workers' compensation audit documentation and payroll reports required for the organization's annual audit.
- Grant support: Provides payroll-related information for grant budgets and reporting, reviews monthly grant activity, and organizes supporting documentation.

Finance Supervisor — Liz Ramirez

Tenure: 20 years, hired 11/20/2009

Liz serves as the Finance Department's primary generalist and operational support resource. Although she does not possess the same level of technical accounting expertise as the Staff Accountants, she has extensive institutional knowledge and the broadest understanding of the department's overall operations. She also provides important day-to-day oversight and continuity when the CFO is unavailable.

Key Responsibilities

- Cash receipts: Posts daily contribution and deposit activity after Development processes contributions through the organization's CRM and manages the daily bank deposit.
- Insurance administration: Coordinates with the insurance broker regarding non-workers' compensation claims, certificates of insurance, payments, and renewal documentation, with CFO support.
- Vehicle and equipment costing: Tracks expenses by vehicle and equipment type to calculate cost-per-mile and cost-per-hour measures used to evaluate distribution costs.
- General administration: Serves as a key administrative resource for the CFO by managing incoming requests, communications, and information needs from staff and external parties.
- Departmental backup: Provides backup support to the Cash Receipts and Accounts Payable functions and can assume their duties during absences or periods of high volume.
- General operational support: Assists with receptionist backup scheduling and other administrative needs.

Accounts Payable — Crystal Rodriguez

Tenure: 11 years with the organization; 8 years in Finance; hired 8/03/2015

Crystal is responsible primarily for accounts payable processing and vendor payments, with additional administrative and reception support.

Key Responsibilities

- Reconciles and enters invoices into the accounts payable module.
- Processes weekly vendor payments.
- Manages the employee vending machines (stocking and cash deposits)
- Provides backup coverage for the receptionist.
- Provides general administrative support to the Finance Department.

Financial Information and Key Contacts

Employer Identification Number: 68-0121855.

We have two financial institutions: Exchange Bank (Operating Account) and Morgan Stanley (Investment Accounts). We work with Exchange Bank staff at the downtown Santa Rosa branch (main branch (707) 524-3301). Jeff Gospe is our account manager at Morgan Stanley (jeffrey.d.gospe@morganstanley.com, (707) 571-5714). Jeff's assistant is Bethany Flint (Bethany.Flint@morganstanley.com, (707) 524-1057).

Authorized signers are: Board Chair, CEO, and CFO.

- 2 signatures are needed for checks over $5,000.00.

Our Cash Management, Long-term Reserve, and Endowment policies can be found on the Board Portal. These policies outline the management of all our Operating and Investment Accounts.

We are required to perform an annual financial audit of all our accounting activities and processes. This results in a published financial audit report, report to the Board of Directors, a Single Audit filing, and required tax returns (Form 990, Form 199, and Form RRF-1). The audit begins with an inventory audit on or about June 30. The finance team produces auditor requested documents beginning early July through mid-September. All audit requirements are located in the Year End Requirements folder in the Finance Department S: drive.

- Financial Auditors: Sorren, Inc.
    - Managing Partner, Roxanne Shockey (rshockey@sorren.com, (707) 577-1528)
    - Audit Manager, Julia Hansen (jhansen@sorren.com, (707) 577-1533)

Financial records and documentation are stored in three areas:
CFO H: drive

- Approved copies of all Finance SOPs
- Full annual budget preparatory and final documentation
- Board of Directors related files

Finance Department S: drive

- Permanent records (organizational, insurance policies, vendor files, donor legacy and reporting files),
- Bank documents and reconciliations, accounts payable vendor invoices with payment record
- Restricted revenue documents and claims) and
- Historical financial information.

Finance S: drive (restricted access file)

- All payroll related documents
- Benefit statements and reconciliation
- Annual audit documents relating to payroll (annual financial audit and workers compensation audit)

Key dates and deadlines

The finance department has ongoing reporting requirements and deadlines. All dates are recorded on the Finance Calendar.

Operations & Supply Chain Department

Alison Smith serves as the Chief Operations Officer (COO). The COO is responsible for overseeing organizational operations and supply chain functions, including: food sourcing, materials management, operations planning, distribution, logistics, demand forecasting, workplace safety, information technology and security and facilities management.

In the event of Alison's temporary, unplanned absence, department managers will continue overseeing their respective operational areas and responsibilities to maintain continuity of services and daily operations.

The Executive Team will assess the anticipated duration and operational impact of the absence to determine whether an Interim COO is necessary.

If an Interim appointment is needed, the President & Chief Executive Officer, in consultation with People & Culture as appropriate, will identify the most qualified individual to assume interim leadership responsibilities. Consideration may include:

- Internal interim assignment
- Temporary delegation of duties among Operations leadership staff
- External contracted support

If an employee assumes significant additional responsibilities on an interim basis, compensation options may include:

- A temporary salary adjustment
- A bonus during the Interim period
- No additional compensation

Compensation decisions will be made in consultation with the Chief People & Culture Officer and in alignment with our Compensation Guidelines.

In the event of a permanent change, we would initiate recruitment efforts to identify and hire a qualified permanent COO.

Operations and Supply Chain has five leaders who oversee the various aspects of the operation.

Erika Carstensen, Director of Supply Chain and Data Analytics

Length of employment with the organization. 9+ Years Date of Hire: 01/03/2017

Scope of Responsibility: Transportation (team and routing schedule), WH Operations (order lifecycle from allocation to loading), CAFB Farm to Family produce routing, Volunteer Production, Food Connections Market. Erika is also a super-user of our ERP system and is a key contact with our ERP vendor, ECCA (Primarius); Data Analyst for Operations and related functional areas. Food Budget development and on-going management.

Erika currently has five (5) direct reports. Transportation Supervisor, WH Ops (3) order allocation-1 and WH supervisor-1 volunteer production supervisor-1 and FCM Manager.

Rod Towery, Director of Facilities, Fleet & IT Operations

Length of employment with the organization. 6+ Years Date of Hire: 10/06/2020

Scope of Responsibility: Facilities maintenance and project management, vendor management and service level monitoring. Fleet and Equipment maintenance and vendor management and service level monitoring, IT (MSP) systems and serves as our first level help desk and service level monitoring. IT applications vendor management and support, internal Safety Committee Lead and Food Defense Lead and a key contributor to our Disaster Plan execution.

Rod has seven (7) direct reports. The janitorial team (3) facilities maintenance team (1) yard and sanitation operation (2) fleet and equipment supervisor (1).

Mario Altamirano, Inventory and Receiving Manager

Length of employment with the organization. 5 Years Date of Hire: 5/27/2021

Scope of Responsibility: Cross-category forecasting for our POH fulfillment and partner demand, including inbound government commodity forecasting and procurement, egg forecasting and procurement, diaper forecasting, procurement and inventory management of offsite storage. Receiving process and put away of goods, Space Planning and coordination on the WH floor and racking, Inventory integrity and cycle counting, Annual physical inventory planning, prep and execution

Mario has seven (3) direct reports. An inventory lead (1) receiving coordinator (1) inventory and receiving specialist (1)

Colin Davidson, Food Resources Manager

Length of employment with the organization. 5 Years Date of Hire: 9/03/2021

Scope of Responsibility: Acquisition of donated goods and key owner of donor relationships, Oversight and planning of Kitchen Collective (KC) activities and budget responsibility for food acquisition and KC overall budget, Procurement of Purchased goods, Retail recovery program development and oversight and reporting, including partner collaboration to support agency-enablement and donor education and planning.

Colin has one direct report. The KC operation and Chef

Our teams are also structured in such a way that the next level of support team members of supervisors, team leads and key staff in each functional area are also trained in critical functions and would be able to assume additional duties should the Managers need to step up in my absence or sudden departure.

Additional Contingency Planning

If there were to be a departure by any of the Ops leadership team members while the Director level position is unfilled, the interim succession plan coverage for them, until new staff is recruited, would be as follows.

Facilities and Fleet Operations	**Erika Carstensen and Justin Hofmann**
Supply Chain WH Ops	**Mario Altamirano and Josh Mash**
Food Connections Market	**Colin Davidson and Mario Altamirano**
Inventory and Receiving	**Erika Carstensen and Frank Gramajo**
Food Resources	**Mario Altamirano and Erika Carstensen**

The Operations and Supply Chain team has documented SOP's that cover the critical functions and the operational methods for our processes and expectations of outcomes. All documents and files for Department operations are located in our shared folder on the network. **S:Operations, with folders by subject matter.** Business critical login credentials and Passwords are kept in our password vault, Password Keeper. Passwords for the Directors have been shared with the COO for continuity of operations.

Access to key and critical organizational data and information:

IT and systems credentials and access

Network, Security and Google Workspace are managed and maintained by our MSP, KLH Consulting. Rod Towery has level 1 administrative rights to our network, which is limited to adding print drivers and other minimal system activities. Setting up new accounts, deactivating accounts and changes to network access and permissions is limited to approval from either myself or Rod and are executed through administrative rights held by KLH. This is our agreement with KLH and they singularly hold the administrative rights to our systems. Owner and key contact at KLH: Soni Lampert, 707-575-9986 slampert@klhconsulting.com

Building access and security

The issuance and management of **keys** to the facility is done through an approval process. The approval is from the appropriate member of the Senior Management team and executed by the Director of Facilities, Fleet & IT or COO. Extra building keys are on a keyboard in the telecommunications room. Facilities personnel and Sr. Management can access the room via the FOB access system. The electronic file with key matrix is located in: rtowery/keysandlockers folder. Vendor: Bill's Lock and Safe, 707-867-0548

The issuance and management of **entry fobs** to the facility is done through an approval process. The approval is from the appropriate member of the Senior Management team and executed by the Director of Facilities, Fleet & IT or COO. Extra fobs (unprogrammed) are located in an overhead cabinet in the Director of Facilities, Fleet & IT office and the information on current programmed FOBs can be found at: https://www.virtualkeypad.com under users.

The issuance and management of **alarm codes** to the facility is done through an approval process. The approval is from the appropriate member of Senior Management and executed by the Director of Facilities, Fleet & IT or COO. Information on current alarm codes and to make edits can be done through accessing the Virtual Keypad application at https://www.virtualkeypad.com. The company that monitors our Burglar System for intrusion or faults is: Advanced Securities Inc. 707-544-9200 - code word "3990".
SOP's for fob and alarm code management can be found
S:Operations/Ops-HR/Facilities-HR: Facilities SOP

PO Approval and Contract Review

Each team member with budget responsibility also plays a role in the budget creation and cost activities for their area and has a good handle on expense management. For CapEx and large unexpected expenses and any contract renewals and needs, the team will alert and seek approval from the CEO.

Department Staffing and Payroll Changes and Approval

For high level discussions and staffing concerns, the team will work directly with the Chief People and Culture Officer and CEO for next steps and solutions.

Key Dates for Operations and Supply Chain

AIB Audit and Inspection: Conducted biennially as a requirement of our Feeding America contract. These assessments are typically scheduled for **March**. Comprehensive preparation, including staff education and rigorous record-keeping, begins six months prior to the audit to ensure compliance with the most current AIB standards.

Empty Bowls: The Redwood Empire Food Bank's signature fundraising event held in **April** requires extensive cross-departmental coordination. All Operations functions—including Facilities, Warehouse, Inventory, Volunteer Engagement, and Transportation—are mobilized to support event logistics and manage food donor communications regarding operational impacts.

Safety Week: Traditionally observed in **May**, this initiative reinforces our organizational commitment to our safety culture. Activities focus on three critical pillars: food safety, occupational safety, and personal well-being and safety.

June: Planning and execution of the annual physical inventory.

Various other inspections and audits are conducted throughout the year in accordance with regulatory mandates. This includes USDA audits for the TEFAP and CSFP programs. Routine inspections for fire suppression systems, health department compliance, and business licensure are coordinated by respective vendors and tracked on the Operations and Supply Chain calendar.

Development Department

Breanne Beseda serves as the Chief Development Officer (CDO). The CDO responsibilities include the fundraising and revenue strategy for the organization: cultivating and building relationships with donors, corporate and foundation partnerships, grants, campaign management, and revenue forecasting and reporting. The CDO works closely with the President & Chief Executive Officer and Board of Directors on fundraising plans, community relations and strategic relationships.

In the event of Breanne's temporary, unplanned absence, Development employees will continue overseeing their respective areas of responsibilities to maintain continuity of services and daily operations.

The Executive Team will assess the anticipated duration and operational impact of the absence to determine whether an Interim CDO is necessary.

If an Interim appointment is needed, the President & Chief Executive Officer, in consultation with People & Culture as appropriate, will identify the most qualified individual to assume interim leadership responsibilities. Consideration may include:

- Internal interim assignment
- Temporary delegation of duties among Development staff
- External contracted support

At the time of creation of this plan, it is recommended that the Director of Philanthropy fill the interim leadership role.

If an employee assumes significant additional responsibilities on an interim basis, compensation options may include:

- A temporary salary adjustment
- A bonus during the Interim period
- No additional compensation

Compensation decisions will be made in consultation with the Chief People & Culture Officer and in alignment with our Compensation Guidelines.

In the event of a permanent change, we would initiate recruitment efforts to identify and hire a qualified permanent CDO.

Development currently has five employees responsible for various aspects of the operation:

Hayley Benjamin, Director of Philanthropy - tenure 7.5 years (DOH 04/22/2019)

The Director of Philanthropy is responsible for developing and executing comprehensive fundraising strategies to support the mission of the Redwood Empire Food Bank and cultivating relationships with donors to secure institutional and individual gifts to meet fundraising goals. Hayley contributes as a member of the organizational leadership team and leads cross-functional efforts to meet development goals for engagement and fundraising. Hayley manages stewardship for an assigned portfolio of mid-level and corporate donors to increase their level of individual giving and/or sponsorship through moves management strategies. The Director of Philanthropy works closely with the Chief Development Officer to pursue new funding opportunities, develop strategies for donor engagement, and create tailored communications for targeted donor segments (including funding proposals for individual donor investment, corporate sponsorship materials, annual fund and campaign communications, as well as assistance with grants). The Director of Philanthropy would be the natural choice for a temporary leadership role in the

absence of the Chief Development Officer.

Joe Talley, Development Data Manager - tenure 4 years (DOH 10/03/2022)

The Development Data Manager plays a critical role in leading data-informed fundraising operations to ensure efficient and effective donor relations. Joe is responsible for managing all aspects of the organization's CRM and fundraising platforms (Virtuous, Raise, Momentum), ensuring data integrity, and developing reports and insights that support strategic decision-making and donor engagement. All criteria-based queries for constituent lists, targeting, and segmentation are managed by Joe. He proactively conducts research to provide donor and prospect profiles to inform cultivation and stewardship. The Development Data Manager also serves as a lead for gift processing, implementing and managing systems to ensure gifts are coded and recognized appropriately. Joe works across departments to ensure data systems are integrated, optimized, and aligned with our mission, managing user access, providing training and support, and serving as the organizational lead for donor data strategy.

Trey Hart, Grants Manager - tenure 6 years (DOH 10/30/2020)

The Grants Manager is a key member of the development team responsible for securing essential funding to support the Redwood Empire Food Bank's ongoing operations, strategic initiatives, and community impact. Trey leads the organization's comprehensive institutional giving program, overseeing all aspects of the grant lifecycle including research, prospect identification, proposal development, submission, compliance, reporting, stewardship, forecasting, and revenue tracking. The Grants Manager ensures that the Food Bank's grant efforts are strategic, efficient, growing, and aligned with organizational priorities. Working closely with the Chief Development Officer and cross-functional teams—including Programs, Operations, Finance, Marketing, and Development Operations—Trey ensures grant opportunities are aligned with programmatic priorities, revenue goals are met or exceeded, and funder relationships are cultivated and stewarded at the highest professional standard. Trey works independently and proactively, leading cross-departmental collaboration to maintain a robust and expanding grants portfolio. Beyond the responsibilities outlined in his job description, Trey has served as the emcee/auctioneer for our Empty Bowls fundraiser and regularly serves as the lead for our Tap Out Hunger trivia nights.

Shana Koehler, Donor Relations Coordinator - tenure 5 years (DOH 10/04/2021)

The Donor Relations Coordinator is a key member of the development team, responsible for ensuring accurate and timely gift processing, thoughtful donor acknowledgement, and providing support for donor cultivation and stewardship activities. Shana serves as the trusted and friendly front-line provider to respond to

donor inquiries and requests, requiring excellent organizational skills, attention to detail, strong communication skills, and a passion for fostering positive relationships with our donors. Database record management is an important piece of Shana's role; she helps ensure accuracy in donor data entry and gift coding, both of which inform accuracy of critical target/segment lists and reports. She works closely with the Development Data Manager as well as the Finance team for careful reconciliation, coding, and acknowledgement of all donor transactions. Shana also works closely with the Marketing team to contribute to communications and events. Beyond the responsibilities outlined in her job description, Shana has taken responsibility for managing all aspects of our Full Plate Partners recurring giving program, and is currently stewarding an assigned portfolio of recurring giving donor prospects.

Angie Ortega, Development Associate - tenure 9.5 years (DOH 03/04/2017)

The Development Associate is an integral member of the Development team and serves as a first point of contact for donor visitors and callers. This highly visible, front-desk role is responsible for warmly greeting donors, accepting and processing donations, answering and directing calls, responding to donor inquiries, and ensuring a welcoming and professional donor experience. Angie assists all visitors to the facility, including walk-in guests in search of food resources. She also assists and occasionally covers for the Volunteer Experience Specialist with volunteer check-in and check-out. In addition to front-line service, the Angie provides essential administrative and operational support to members of the Development team, assisting with gift processing, acknowledgments, database management, and donor stewardship activities. Additional assistance in these areas becomes critical during the holiday season or time of crisis.

Key Development Information and SOPs

The Development team is responsible for the generation of all contributed revenue (individuals, corporate, grants, and legacy) with an annual goal of $15M to support the budget of the organization. Closely connected with Finance and Marketing, Development serves as the lead for all fundraising programs, campaigns, communications and donor relationships.

The Development team has established a mission, vision, and values for the department that guide our work, as well as a set of strategic priorities and objectives. Based on these priorities and objectives, we create both collective and individual annual plans outlining the tactics we intended to implement, each with an assigned owner, timeline, and metrics for success. These documents live in a shared folder on the REFB Google drive.

The tool most essential to our work is the Virtuous CRM system and modules; every DEV team member is proficient in utilizing CRM, Raise, and Momentum for all donor information and communications. Detailed SOPs for all Virtuous processes are housed in a shared Development folder on the REFB Google drive, along with SOPs for all other functional areas of the department and associated tools. Passwords for all systems and portals are maintained in a single file, also housed in the shared drive. The file most necessary for board and leadership review of revenue performance is our Development Dashboard, currently housed in a shared folder in Sharepoint.

Giving Groups and Programs

Annual Fund: Active donors (within 18 mos.) below $1,000 level
Mid-level Donors: Active donors (within 18 mos.) between $1,000 and $9,999
Major Donors: Active donors (within 18 mos.) at or above $10,000 level
Full Plate Partners: Recurring donors, monthly or quarterly at any level
Second Helping Society: Those who have indicated REFB in estate plans
Corporate Sponsorships: Company gifts with increasing levels of benefits
Investment Giving: Stock, Bonds, Mutual Funds, DAF gifts, QCD gifts, IRA gifts, etc.
Volunteer conversion (program in development)

Key Projects and Events

July/August: Strategic plan review, preparation of annual plans by function, and creation of annual performance dashboard for board and leadership
September/October: Hunger Action Month, Savor the Mission event, matching donation campaign, creation of annual holiday appeal, capacity building for holiday season influx
November/December: Most intense activity with response to annual holiday appeal, Giving Tuesday, match campaigns, and year-end communications
January/February: Holiday gift processing and reporting, tax statement letters, Investor Briefing event, launch of planning, communications, and sponsor solicitation for Empty Bowls, next FY revenue forecasting
March/April: Empty Bowls paddle pre-commitments and guest strategy, management of complicated acknowledgements, Board reunion event, development of Spring appeal, next FY budget planning
May/June: Management of Spring appeal, forecast and budget refinement, Full Plate Partners recognition event, Second Helping Society recognition event
Quarterly: Donor newsletters, data audits, regional Conversations on Hunger events, board presentations, planned giving appeals

Programs

Jessica Hernandez is the Director of Programs. The Director of Programs responsibilities include overseeing the planning, implementation and evaluation of Redwood Empire Food Bank's programs.

In the event of Jessica's temporary, unplanned absence, the Programs Managers will continue to oversee their respective areas of responsibilities to maintain continuity of services and daily operations. .

The Executive Team will assess the anticipated duration and operational impact of the absence to determine whether an Interim Director of Programs is necessary.

If an Interim appointment is needed, the President & Chief Executive Officer, in consultation with People & Culture as appropriate, will identify the most qualified individual to assume interim leadership responsibilities. Consideration may include:

- Internal interim assignment
- Temporary delegation of duties among Programs staff
- External contracted support

If an employee assumes significant additional responsibilities on an interim basis, compensation options may include:

- A temporary salary adjustment
- A bonus during the Interim period
- No additional compensation

Compensation decisions will be made in consultation with the Chief People & Culture Officer and in alignment with our Compensation Guidelines.

In the event of a permanent change, we would initiate recruitment efforts to identify and hire a qualified permanent Director of Programs.

Programs has four managers who oversee the various aspects of the operation.

Programs Managers

All managers participate in hiring, onboarding, and training of new staff, as well as ongoing 1:1 meetings, small team meetings, and manager, PROPS, and Programs team meetings. Managers are responsible for performance management, client feedback management, schedules, and coverage for all direct distribution sites. Managers are involved in strategic conversations about distribution locations, schedules, staffing, and outreach for site expansion, as well as consolidation if it's determined our resources are better utilized elsewhere.

Programs Manager - Raquel (Senior Security Initiative)

- Manages 3 full-time program coordinators and a part-time regional coordinator
- Oversees most remote and rural direct services in Sonoma, west county area, Lake and Mendocino Counties, including partner-led sites: Sonoma Valley Community Health Center, El Verano Elementary, Trinity Baptist Church, Redwood Christian Fellowship, Starcross Food Pantry
- Assists with Commodity Supplemental Food Program (CSFP)/Senior Basket (SB) and Feeding America compliance for direct service sites and northern coast partners, including Mendo Food Network, Rural Human Services, Family Resource Center of the Redwoods, and Food for People
- Manage SB Data Tracking, SB duplication, and SB under 60 data
- Networks and builds relationships with other organizations and host locations

Programs Manager: Arturo

- Manages 3 full-time program coordinators
- Oversees the Emergency Food Assistance Program (TEFAP) contracts, compliance, TEFAP Household Reporting to the California Department of Social Services (CDSS), and partners who access USDA commodities
- Assists with CSFP/Feeding America compliance for the northern coast partners, including Mendo Food Network, Rural Human Services, Family Resource Center of the Redwoods, and Food for People
- Leads internal procedures for CSFP & TEFAP Civil Rights, income guidelines, site monitoring, Vivery direct service, Justice Wise, Groceries to Go data entry, quarterly participant newsletter

Programs Manager - Mari (Every Child, Every Day)

- Manages 3 full-time program coordinators
- Oversees the Child and Adult Care Food Program (CACFP) & Summer Food Service Program (SFSP) contracts, compliance, monitoring schedule, grants, and programming, including the biennial Afterschool Café audits with the California Department of Social Services.
- Leads Pre- and School Pantry grants and annual survey reporting requirements
- Maintains relationships with Santa Rosa City Schools, CACFP/SFSP site contacts, and most School Pantry sites.
- Manages internal procedures for CACFP and SFSP site onboarding, training, and monitoring; Vivery direct service updates, monthly Distribution Calendar
- Initiates school holiday, summer closure, and startup processes. And, oversees Pre and School Pantry and Burbank Housing partner-led sites including Healdsburg Recreational Park, John Reed Elementary, 4Cs Gold Ridge

Preschool, Achievers Preschool, Little Monarchs Preschool, SRJC Children's Center, Park Lane, and Towers Apartments.

Programs Safety & Compliance Manager: Eddie

- Supervise 2 program coordinators
- Manages W^5 training for current and new volunteers, the Galaxy user group, and ongoing communication
- Weekly Galaxy volunteer check-in report reminders
- Whip Around Pre-Trip Inspection Report Management
- Excessive Van Speed Management
- Participates in Safety Committee Meetings, Volunteer Coordination Meetings
- Performs unannounced safety site visits and works in collaboration with the program's coordinators to improve safety for participants, volunteers, and staff on site. And, oversees volunteer and participant incident follow up.
- Manages W^5 equipment deployment and ongoing equipment maintenance
- Leads our partner-led site at St. Leo Church & Iglesia Josue @ Rohnert Park Community Center
- Site characteristics (coming soon)

Coordinators

Programs Coordinator 70/30: 11 full-time staff

- Lead all aspects of food distributions, including: site management, data entry, client database management, order planning, volunteer recruitment, retention and training, and providing excellent customer service to all.
- Assist with the compliance and operations of all the Redwood Empire Food Bank programs, including food safety and defense, data tracking, grant reporting, evaluations and monitoring, nutrition education, and other duties as assigned.
- Assigned Duties:
    - Eliza: CalFresh prescreen support, Catholic Charities partner-led sites oversight, Oasis, Participant newsletter and miscellaneous projects, including notes clean up, no site name, survey data entry, etc.
    - Yahaira: Oasis and miscellaneous projects including notes, profile clean up, survey data entry, etc.
    - Josie: Performs all REFB staff and site CACFP & SFPS training, supports ongoing site compliance, meal and waste counts data entry, and creates a monitoring schedule for both programs to mirror CDE/CDSS requirements.
    - Juana: Distribution Signage Posters; W^5 volunteer recruitment, new site outreach, etc.

    - Gustavo: Galaxy shift updates and volunteer feedback review
    - Daniel: SB duplication, SB under 60 clean up, & Outreach Request approval process
    - Flor: Monthly CSFP Nutrition Education
    - Miguel: Vehicle Standardization Project and Volunteer No Show Follow Up
    - Shared Projects:
        - G2G data entry - Arturo, Eliza, Yahaira
        - Volunteer/PRO Coordination meetings, distribution volunteer experience - Gustavo & Miguel
        - Recipe & nutrition education team - Yesenia (lead), Mari, Nena, Eliza, Leslie, Araceli, Flor
        - CACFP & SFSP site monitoring - Maria, Josie, Yesenia, Leslie, and Eliza

Part-Time Regional Programs Coordinator: Kevin

- Support food distribution activities in Lake and Mendocino counties, including: site management, volunteer recruitment, retention and training, and providing excellent customer service to all.

Training & Standard Operating Procedures

Programs

- Programs Handbook
- W5 Handbook
- TEFAP/CSFP Monitoring Process
- Distribution Signage
- Galaxy Handbook
- CACFP Annual Mandatory Training & REFB Afterschool Cafe Handbook
- More resources are available in The Wrap.

Partnerships

Amy Tobener-Talley is the Director of Partnerships. The Director of Partnerships responsibilities include overseeing the planning, implementation of all aspects of the Redwood Empire Food Bank's network of Partner Organizations.

In the event of Amy's temporary, unplanned absence, the Partnerships employees will continue to oversee their respective areas of responsibilities to maintain continuity of services and daily operations.

The Executive Team will assess the anticipated duration and operational impact of the absence to determine whether an Interim Director of Partnerships is necessary.

If an Interim appointment is needed, the President & Chief Executive Officer, in consultation with People & Culture as appropriate, will identify the most qualified individual to assume interim leadership responsibilities. Consideration may include:

- Internal interim assignment
- Temporary delegation of duties among Programs staff
- External contracted support

If an employee assumes significant additional responsibilities on an interim basis, compensation options may include:

- A temporary salary adjustment
- A bonus during the Interim period
- No additional compensation

Compensation decisions will be made in consultation with the Chief People & Culture Officer and in alignment with our Compensation Guidelines.

In the event of a permanent change, we would initiate recruitment efforts to identify and hire a qualified permanent Director of Partnerships or consider an internal staffing solution.

Partnerships has three employees who oversee the various aspects of the operation.

Partnership Managers

Partnership managers create and maintain strong relationships with our Partner Network. Partnership managers have separate but overlapping responsibilities. While in general, the Partner Resources Manager is responsible for onboarding and monitoring partners and the Outreach and Partnership Manager is responsible for partner outreach and maintenance, they are cross-trained and often team up for partner visits and are fully capable of covering each other's duties. They both hold a Food Handler Manager certification for partner monitoring and compliance. Partnership managers attend Programs, PROPS, Partnership Management, and Partnership Team POP (OPS)meetings. Managers are involved in strategic conversations about partner outreach, onboarding, maintenance, compliance, consolidation, and capacity building. Partnership managers attend to the Partner Relations phone line as well as email from partners@refb.org and update partner resources and accounts as needed. They assist with the planning and execution of the Monthly Partner Check-ins, Annual Partner Infographic, and the Annual Partner Conference. They also prepare the Partner Spotlight feature for the Monthly Partner Network and tackle Primarius clean-up projects as needed.

Partner Resources Manager: Lupita

- Oversees all Feeding America compliance protocols involving partners (monitoring)
- Determines partner eligibility and onboards new partners
- Tracking of partner food handler certification
- Manages partner surveys, Grocery Recovery Program (GRP) onboarding, and reporting completion
- Maintains partner accounts receivable
- Continues to assist with donations during the busy season
- Attends to calls from Food connections (FC), Partner Relations, and Partner Billing
- Leads the Monthly Partner Check-in

Outreach & Partnerships Manager: Stephanie

- Manages client services, including CalFresh
- Conducts team and 1:1 meetings and reviews
- Manages the REFB On-Site Pantry
- Attends CalFresh meetings
- Manages phone coverage for the FC and CalFresh
- Attends to calls from General Referral, CalFresh, Partner Relations, and Feedback calls
- Conducts regular partner outreach
- Identifies areas of focus and potential partners
- Manages the “Contact Us” form
- Manages Vivery and the Get Food Resource Map for partners and distributions
- Manages partner onboarding and maintenance of Oasis/W[5]

Programs Coordinator 30/70: Nena

- Provides bilingual support for food referrals and CalFresh application assistance to clients over the phone.
- Assists with food distributions, leads Earl Baum and the REFB On-Site Pantry

Partnerships

- Partner Handbook
- REFB Partner Management
- REFB Customer Service and Phone Support
- More resources available on The Wrap

Data & Monthly Reporting for Programs and Partnerships

- Jessica: Monthly W⁵ reports to Finance; quarterly AAA Brown Bag reports, annual April FNS 191 CSFP report
- Amy: CDSS Diaper Bank quarterly reports, monthly partner participation data, FCRC RingCentral data, FCRC Oasis assistance
- Program Managers - CSFP Biennial Survey; next due date is September 2027
- Arturo: monthly CDSS TEFAP Household Reporting due by the last of the following month; monthly Programs G2G tracking; monthly P2 people served data entry
- Raquel - Monthly Programs SB tracking
- Maria - SFSP salary and mileage details provided to Finance annually by the end of August to be submitted to SRCS for reimbursement
- Eddie - Weekly Galaxy volunteer check-in report reminders
- Josie - monthly CACFP meal and waste counts submitted to Finance by the 10th of the following month to be entered into CNIPS
- Steph- Calfresh activity

W⁵ (Oasis Insight)
Jess, Amy, the Finance Team (shared login), all program managers (individual logins), Nancy (volunteer) and Lupita have administrative access to W⁵. Eliza supports ongoing W⁵ projects and uses the shared Supervisor Admin or vpJessica3 login. Admin access allows for agent logins to be created, as well as other agencies, barcodes, and a more advanced level of reporting.

The Outreach and Partnerships Manager manages W⁵ onboarding and training responsibilities. Partners email partners@refb.org or call the Partner RingCentral line 707-523-7904 for support and troubleshooting. Some partners, and especially direct service partners, have one particular contact they reach out to for support.

Eddie oversees all volunteer W⁵ volunteer onboarding. He screens volunteers, initiates shadowing, and then completes their onboarding. We track volunteer onboarding here. Eddie also manages the Galaxy W⁵ user group and ongoing communication with volunteers for database updates. All program managers and program coordinators are re-training volunteers as needed.

Marketing & Volunteer Engagement

Rachelle Mesheau is the Director of Marketing & Communications. The Director of Marketing & Communications responsibilities include developing, implementing, and executing comprehensive marketing, communications, and public relations strategies. The Director of Marketing & Communications also does event management and oversees Volunteer Engagement

In the event of Rachelle's temporary, unplanned absence, the Marketing employees will continue to oversee their respective areas of responsibilities to maintain continuity of services and daily operations.

The Executive Team will assess the anticipated duration and operational impact of the absence to determine whether an Interim Director of Marketing & Communications is necessary.

If an Interim appointment is needed, the President & Chief Executive Officer, in consultation with People & Culture as appropriate, will identify the most qualified individual to assume interim leadership responsibilities. Consideration may include:

- Internal interim assignment
- Temporary delegation of duties among Marketing staff
- External contracted support

If an employee assumes significant additional responsibilities on an interim basis, compensation options may include:

- A temporary salary adjustment
- A bonus during the Interim period
- No additional compensation

Compensation decisions will be made in consultation with the Chief People & Culture Officer and in alignment with our Compensation Guidelines.

In the event of a permanent change, we would initiate recruitment efforts to identify and hire a qualified permanent Director of Marketing & Communications.

The Marketing & Volunteer Engagement Department has five employees who are responsible for various aspects of Marketing, Communications, and Volunteer Engagement.

Director of Marketing & Communications

Key, high-level function:

Leads the overall marketing and communications strategy and ensures the Redwood Empire Food Bank has a strong, cohesive brand and narrative across all audiences and channels.

Critical responsibilities (high level):

- Set and implement comprehensive marketing, communications, and PR strategy aligned with organizational goals.

- Own brand management, core messaging, and creative direction (including graphic design and brand standards).
- Create, implement, and oversee integrated campaigns (direct mail, digital, print) that support fundraising, programs, and community engagement.
- Serve as primary media and PR lead, including crisis communications and major organizational announcements.
- Lead the marketing team, collaborate across departments, and report marketing performance and insights to senior leadership and the board.

Position held by: Rachelle Mesheau

Backup 1: Nicole Lorange

Backup 2: Nick Agius

Marketing Coordinator

Key, high-level function:

Provides operational and content support to ensure the Redwood Empire Food Bank's marketing plan is executed smoothly across digital, social, events, and basic PR activities.

Critical responsibilities (high level):

- Support creation and maintenance of marketing materials (flyers, presentations, emails, web updates) under established brand standards.
- Manage day-to-day social media posting, monitoring, and basic community engagement aligned with the food bank's voice. (Includes advocacy engagement.)
- Assist with logistics and communication needs for events and outreach activities.
- Maintain organized digital assets and help track basic campaign and channel performance.
- Provide responsive support to internal teams and help keep communications timely and consistent.

Position held by: Akari Yu

Backup 1: Nicole Lorange

Backup 2: Nick Agius

Marketing & Corporate Engagement Manager

Key, high-level function:

Leads marketing and communication strategies that deepen engagement with food/manufacturing partners, corporate partners, and corporate volunteer groups, and executes donor email under overall strategy.

Critical responsibilities (high level):

- Develop and implement communication and engagement strategies for food donors and corporate partners.
- Strengthen partner retention through recognition, benefits delivery, impact reporting, and joint campaigns.
- Lead corporate volunteer and workplace fundraising initiatives (food drives, group visits, cause-marketing, etc.).
- Execute donor-facing email campaigns in alignment with organizational fundraising and stewardship goals.
- Produce partner-focused content and materials (stories, case studies, digital/print assets) that showcase the impact of partnership with the food bank.

Position held by: Nick Agius

Backup 1: Rachelle Mesheau

Backup 2: Nicole Lorange

Communications & Community Engagement Manager

Key, high-level function:

Oversees broad communications with volunteers, staff, food recipients, and the community, and leads events and food drive-related outreach that advance engagement and awareness.

Critical responsibilities (high level):

- Develop and manage communication strategies for community engagement, volunteer recruitment/retention, and recipient outreach.
- Supervise volunteer communications and ensure consistent, effective messaging to the volunteer base.
- Lead internal communications channels (staff newsletters, Wrap, staff events) to keep employees informed and connected.
- Oversee food recipient communications (clear, accessible, culturally sensitive information about services and resources).
- Plan and manage key organizational events and community outreach efforts, including communication plans for food drives and awareness programs.

Position held by: Nicole Lorange

Backup 1: Rachelle Mesheau

Backup 2: Nick Agius

Volunteer Communications Specialist

Key, high-level function:

Owns volunteer-facing communications and recognition, ensuring volunteers are informed, appreciated, and engaged over time.

Critical responsibilities (high level):

- Develop and deliver ongoing volunteer communications (newsletters, email campaigns, social content) that support recruitment, engagement, and retention.
- Lead volunteer recognition efforts, including appreciation events and programs.
- Create and maintain orientation materials, handbooks, and communication guidelines for volunteers and staff working with volunteers.
- Track volunteer engagement metrics and report on retention and satisfaction to inform improvements.
- Support youth and community outreach for volunteer recruitment and engagement.

Position held by: Katie Del Santo

Backup 1: Nicole Lorange

Backup 2: Liz Berry

Volunteer Relations Specialist

Key, high-level function:

Manages the day-to-day, on-site volunteer experience and serves as the primary point of contact for individual and group volunteers.

Critical responsibilities (high level):

- Coordinate volunteer schedules, shift assignments, and check-in/check-out processes.
- Provide on-site orientation, task guidance, and support to ensure a safe, positive volunteer experience.
- Handle one-on-one communication with volunteers (phone, email, in-person) for questions, concerns, and feedback.

- Maintain accurate volunteer records, hours, and participation data.
- Collaborate with other departments and volunteer communications to align on volunteer needs and engagement strategies.

Position held by: Liz Berry

Backup 1: Katie Del Santo

Backup 2: Nick Agius

People & Culture

Patty Striniste is the Chief People & Culture Officer. The Chief People & Culture Officer responsibilities include overseeing all facets of human resources: employee relations, compensation, benefits, compliance with employment law, employee retention, performance management, and the employee experience..

In the event of Patty's temporary, unplanned absence, Paula Handelman would step in to oversee the People & Culture department in tandem with her role as Chief Financial Officer. Upon Paula's retirement, we would engage Personnel Perspectives or Lynx Employer Resources to support the People & Culture department.

The communication of changes in the People & Culture department would be handled by Allison Goodwin.

In the event of a permanent change, we would recruit a new Chief People & Culture Officer.

The People & Culture Department has two employees: Patty Striniste, Chief People & Culture Officer and Nayeli Chavez, People & Culture Representative.

Nayeli handles the majority of the administrative tasks of the People & Culture department: routine HR questions from staff, onboarding/offboarding process and documents, benefits enrollment, ergonomic assessments, Department of Transportation compliance requirements, workers' compensation paperwork and claim filing, unemployment/disability/paid family leave forms for EDD, compliance training and tracking, employment verifications, and maintains personnel files.

In the event of Nayeli's temporary, unplanned absence, Patty would step in to cover her job duties. For a permanent change, we would recruit a new People & Culture Representative.

Important contacts for the People & Culture Department:

Legal Counsel for Employment Law

Spaulding McCullough & Tansil
Lisa Ann Hilario, Attorney
lhilario@smlaw.com
Loreen Dold, Legal Assistant
ldold@smlaw.com
(707) 524-1900
90 E St. #200
Santa Rosa, CA 95404

Adams Law Group
Aura Adams, Attorney
aura@adamshrlaw.com
(239) 989-2572
1792 2nd St.
Napa, CA 94559

Human Resources Information System/Payroll System
Innovative Business Solutions (IBS)
Marie Millar, HR Product Manager
mmillar@ibspayroll.com
6010 Commerce Blvd. Suite 151
Rohnert Park, CA 4928
(707) 586-4300

Benefits (Medical, Dental, Vision)
EPIC Insurance Brokers & Consultants
Jim Barnes, Broker
Jim.barnes@epicbrokers.com
(707) 849-3742

Kelly Nicoll, Account Executive
kelly.nicoll@epicbrokers.com
(510) 903-0281

Retirement Account (403b)
Mutual of America
David Leathers, Client Relationship Manager
david.leathers@mutualofamerica.com
(503) 558-7136

Other People & Culture specific vendors used are included in our shared folder – accessible by Patty and Nayeli only. Examples of vendors would be Intellicorp (background check vendor), HireRight (drug screens), California Department of

Motor Vehicles (Pull Notice Program), Indeed (Job Postings), and ServSafe (Food Handlers Training).

Key priorities by month for People & Culture:

January
-Reach out to Spaulding, McCullough & Tansil (Lisa Ann Hilario) to request completing a new handbook with a target rollout to all employees in March.
-Understand legal updates for the new year and address accordingly.
-Northern California Fair Pay Survey launches (final day to submit data is in February).
-Affordable Care Act (ACA) Reporting (due in February).
-Income Tax Credit notification to all staff.
-Order and hang new compliance posters on the bulletin board outside Staff Kitchen.

February
-ACA Report due.
-Northern California Fair Pay Survey data submission due.

March
-Leadership submits plans for adding positions:
- Works with CEO and Senior Leadership on approval of adding a position
- Review job descriptions and pricing of the job

-Roll out the new employee handbook to all staff by department. The presentation includes:
- Updates to the handbook (laws, policies, etc.)
- Review and signing of required forms (meal/rest break waiver, handbook acknowledgement, arbitration agreement, discrimination/retaliation/harassment policy, consent to use, etc.)
- Wage and hour reminders regarding rest/meal breaks, attestation questions, accurately reporting time worked, no off the clock work
- Any situations that came up during the year as reminders to all staff.

April
-Northern California Survey results are ready. Survey data is used to establish new salary ranges for all positions in the organization.
-Provide People & Culture budget to Finance.

May and **June** do not have notable events.

July
-Facilitate WVPP training for all staff.
-Cornhole tournament.

August
-Reach out to EPIC Insurance Brokers to inquire about benefits for the upcoming plan year. Benefits run December 1 - November 30.
-Wellness Fair.

September
-Schedule benefits presentation for the Executive Team and confirm benefits decisions with EPIC.

October
-Medicare Creditable Coverage Disclosure Notice to all staff.
-Benefits presentations in preparation for Open Enrollment for all staff by EPIC.

November
-Open Enrollment for all staff.

December
-Benefits reconciliation.
-Holiday party.

Resources and Contact Information

Link to: Employee Directory and Organizational Chart

Board Member Contact Information As of July 2026		
Name	**Phone**	**Email**
David Berry, Board Chair	(707) 888-3482	david@berryandbabb.com
Amy Lyle, Vice Chair	(707) 360-7550	alyle@refb.org
Kevin McCullough	(707) 696-9333	kjmccullough@sonic.net
Kathy Inouye, Treasurer	(707) 484-7621	kminouye@gmail.com
Mike Schuh	(707) 833-2135	mschuh@foundationcap.com
Troy Sanderson	(707) 524-3111	troy.sanderson@exchangebank.com
Sheri Wenzel, Secretary	(707) 322-6963	slwen4644@gmail.com