

MEMORANDUM

Date: February 2025

From: Sweet Charity Oversight Committee

Re: Positions and Allocation of Responsibilities; Financial Update

The success of Sweet Charity since 2017 and the income stream it generates has made the shop essential to the viability, and visibility, of Advent House. In order to position Sweet Charity to operate well into the future, the knowledge and experience gained by the long-time dedicated staff and volunteers needs to be acknowledged, leveraged and defined as responsibilities. To effectively spur sales growth, manage inventory acquisition, foster volunteers, and accommodate staff scheduling needs, the Oversight Committee is formalizing a team approach to managing the business, effective 3rd Quarter of 2025. Store Management will focus on day-to-day store operations, while the Store Administrator and Advent House Business Manager will handle tasks that can be substantially completed offsite.

OUTLINE OF RESPONSIBILITIES (DRAFT) (input from all parties requested for finalization)

SHOP MANAGEMENT (Meg Sarnoff, Mgr & Ward Pedde, Ass't. Mgr)

HANDLING DAY TO DAY OPERATIONS:

- Open and close shop
- Ensure adequate staff levels, paid and volunteer positions, in conjunction with Oversight Committee
- Overall cash management and weekly bank deposits
- Manager has credit card for shop purchases
- Customer service, including phone and email monitoring
- Inventory management, including testing, measuring, cleaning and pricing of items prior to placement on shop floor
- Maintain pick-up and delivery schedule
- Process drop-off donations
- Manage volunteer recruiting, training, scheduling, retention and recognition
- Secure necessary service/repairs for shop
- Provide photos several times a week to the Store Administrator for social media
- Respond to inquiries on social media platforms
- Update phone voicemail system as needed

- Determine shop layout, display, and storage area organization
- Store supply tracking and ordering
- Input directly, or submit to Shop Administrator, new email newsletter signups by the 25th of each month
- Retain and submit monthly cash out slips and receipts to the Business Manager monthly
- Handle shop issues with customers, volunteers and plaza management
- Schedule routine truck maintenance and yearly August inspection with Hoselton
- Determine Ebay-worthy offerings and handle the process from posting to shipping
- Hold set of store keys

** Manager and Assistant Manager will work collaboratively to determine respective areas of primary responsibility, dependent upon skills, interests and shop needs.

SHOP ADMINISTRATOR (Nancy Loughran, Volunteer)

- Prepare and analyze quarterly and annual financial reports for management, Oversight Committee and Advent House of Perinton Board
- Determine standard promotions, considering financial statements and customer growth objectives
- Develop quarterly marketing and promotions schedule with management in Dec/Mar/June/Sept of each year.
- Prepare monthly newsletter, soliciting input from both SC and AH
- Manage store website
- Manage posts and ad placements on social media platforms: Facebook, InstaGram, NextDoor, Google, YELP, Constant Contact
- Provide Business Manager with receipts of monthly social media charges
- Attend monthly FPMA and Fairport Chamber meetings when able, monitor emails from them and participate in business community events
- Oversight Committee member
- Liaise with Lightning (POS) and all social media platforms to ensure SC is benefiting from best rates/offers as a non-profit
- Manage the Canva graphics account used by SC and Advent House
- Organize the Google Drive
- Update printed and digitally posted documents as needed
- Update calendar aspects of Schedule/Payroll and PickUp/Delivery spreadsheets
- Assist as cashier or manager at shop on as-available basis
- Access Sweet Charity email account as needed
- Hold set of store keys

BUSINESS MANAGER (Amy Hiller at Advent House)

- Reconcile monthly bank and credit card statements
- Monitor Amazon account for supply purchase details
- Submit quarterly Sales Tax Payments
- Create shop components of overall Advent House annual budget
- Handle business communication with Whitney Town Center management
- As needed impromptu computer/customer service support
- Handle truck registration/ insurance
- Oversight Committee member
- Liaise with Store Management and Store Administrator as needed
- Access Sweet Charity email account as needed

Recording and consistently updating the tasks essential to shop operations and administration will enable all involved to handle tasks during the business day, allow store staff to work desired hours and enable us to pivot more effectively to serve our hard earned, and growing, customer base.

GOALS FOR REMAINING 3rd QUARTER 2025 (ends 3/31/2025):

- Submission to OC any holiday-related store closings for 2025
- Store Management and Administrator will implement a furniture inventory management system by the end of Feb 2025. This objective was first mentioned in the Oversight Committee Memo dated 12/12/2023.
- Determine criteria for prospective acquisition of a used box truck for replacement of existing truck.
 - Jim Brekosky and Jim Flanagan will serve as lead investigators/purchasers on behalf of SC/AH, with authority to determine necessity and timing of purchase, vendor selection, and negotiation of trade/purchase
 - Reserve funds of Advent House will be used for any purchase, with AH Fundraising Coordinator (Allison) to then backfill costs by a capital funding campaign
- Formalize contingency plan for store operations if managers are not present, including providing a key set to the AH Business Manager.

FY 2025 2ND QUARTER - FINANCIALS & NOTES FROM MEETING ON 11/18/2024

1st and 2nd Quarter Comparison:

	1 & 2 qt FYE 2024	1 & 2 qt FYE 2025	% Change
Net Revenue	\$175,376	\$178,533	+2%
# Sales	4,825	5,960	+24%
Avg Daily Sales	\$1,414	\$1,396	+0%
Avg Sale	\$36.53	\$30.15	-17%
Net Profit	\$78,527	\$90,749	15.5%

Highlights

- Increased hours on Thur and Fri to 10-6pm, effective 10/17
- Nov 2024 strongest month ever: \$43,254 net revenue. Holiday merchandise as of 11/4 and Black Friday and Small Business Saturday strong drivers
- Net profit up over 15% and net # sales up 24% over comparison period
- Jewelry net revenue up 38% over comparison period and accounted for over 16% of total revenue through first two quarters of 2025
- Net Revenue generated with evening hours on Th & Fri through 2024 was \$6,349, an average of \$317 per evening (20 evenings open)
- Net Ebay sales of \$2,167 over the two quarters
- Participated in the November FPMA Sip n Shop event; held Holiday Open House in December
- Great American Diner extended hours until 8 pm each night. Sweet Charity ran a joint raffle promo and Brian Reilly, owner, provided (4) \$25 GAD gift cards.
- Surpassed 3,000 followers on Facebook page and 1,500 on InstaGram

Present Challenges:

- Non-routine truck maintenance on the lift gate totaled \$825 and kept the truck off the road for most of December. Saints Place helped out by loaning their truck and one of their volunteers for some runs. Learned from the repair done at UniCell that the remaining lifespan of the liftgate will likely require a truck replacement sooner rather than later.
- Inventory stored in the hallway continues to be a challenge. Whitney Center management has advised that fines will be passed on to offenders.