

MEALS ON WHEELS OF RHODE ISLAND

STRATEGY UPDATE

**PREPARED BY:
MEALS ON WHEELS OF RHODE ISLAND**

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WITH ASSISTANCE FROM

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PURPOSE OF THIS REPORT

This report was prepared for Meals on Wheels of Rhode Island (MOWRI). It outlines a strategy and action plan to help ensure MOWRI remains relevant in the face of changing times. This plan addresses organizational and operational questions, issues and opportunities that have been identified by the MOWRI Governing Board, management, staff, funders, donors and clients. It provides an operational roadmap to ensure necessary change occurs at all levels of the organization toward the goal of addressing the organization's current challenges and seizing future opportunities.

Strategic Areas and Targets

- I. **Delivery of Services:** Over the next three years, we will increase the number of meals served and customers we touch by expanding core services and ensuring that the quality of our food and service remains at an as-good or better level than currently delivered. Progress will be measured using data collected during annual surveys that report on these numbers.
- II. **Branding and Marketing:** Over the next two years, we will re-orient brand awareness to reach a new and larger audience and ensure that our target audience — caregivers, referrals and funding sources — can differentiate MOWRI from other national food service organizations in terms of quality and diversity of services. Progress will be measured by an increase in public and private funding of 15 percent and an increase in customers' referrals of 20 percent.
- III. **Partnership and Relationship-building:** Over the next three years, we will increase awareness about MOWRI in the nonprofit and donor communities by delivering the message face-to-face at key statewide forums and meetings. Progress will be measured by the number of new partner opportunities identified for MOWRI within the nonprofit and donor community.
- IV. **Evolve internal systems, structure and communication mechanisms to achieve growth:** Within six months, we will review and begin the implementation of a re- alignment of our human resources capacity and assigned responsibilities to ensure an efficient distribution of work between the MOWRI Director and MOWRI staff to achieve the strategic initiatives laid out in the plan. This includes initiating regular feedback loops with staff to address concerns, ideas and opportunities. Progress will be measured by: (1) defined advancement on implementing the above strategic initiatives, 2) a documented process of regular feedback from and dialogue with staff, and 3) a periodic review and revision of job descriptions, as needed, to reflect MOWRI's evolving workload.
- V. **Re-institute an Active Nominating Committee to Improve Board Capacity:** As soon as practicable, re-institute an active nominating committee that defines capacity needs, clarifies the role of board members and, based on this assessment increases the size of the board to 11 in year one and to 15 by year two; it shall also re-institute term limits as of the February 2016 special elections to create a clear path for new board members to move into leadership positions.

Strategy and Actions by Target Area

- I. Delivery of services:** Over the next three years, we will increase the number of meals served and customers we touch by expanding core services and ensuring that the quality of our food and service remains at an as-good or better level than currently delivered. Progress will be measured using data collected during annual surveys that report on these numbers.

Strategy: Over the next three years, we will increase the number of meals served and customers we touch on a weekly basis by 20% by diversifying our delivery strategy and ensuring that the quality of our food and service remains at good or better level as measured by semi-annual surveys.

Actions to achieve strategy

1. ***Given the recent increase in State support,*** produce several short-term tangible successes to demonstrate the difference this increased financial support is making.
2. ***Recognizing that the current caterer plays a key role in MOWRI's success,*** it is important to:
 - regularly review food quality and hold caterer to the highest standards of meals preparedness
 - continue to enforce the terms of contract when the caterer is not meeting standards as agreed
 - conduct regular review meetings to assess caterer performance
 - conduct regular site inspections
3. ***Continue to improve the support system around new client recruitment and the delivery process.*** Quality of service that meets clients' need remains an institutional focus. Toward this end, priorities are to:
 - a. Improve the website so all information that a client, potential client, or their caretaker or spokesperson needs to know about MOWRI can be found quickly and easily. Treat website as additional staff capacity.
 - b. Provide automated updates to clients/their caregivers on meal choices, storm planning, etc.
 - c. Establish a system to ramp up as the organization meets its growth targets for its client base, and its targets for adding paid and volunteer drivers and/or other staff or volunteers.
 - d. Produce a three-year forecast that increases service numbers while lowering, or, at least, holding steady, the overhead costs.
 - e. Solicit a multi-faceted system to solicit regular feedback from clients — surveys, front-line staff inquiries, and other vehicles to be determined – and use the input from these to drive incremental organizational change, improvement and growth.
4. ***Increase the point-of-sale efficiency*** by decreasing the time gap between application and decision-making.
5. ***Expand beyond current service levels.*** State projections consistently indicate that the number of seniors in Rhode Island is growing and the State's explicit goal of balancing long-term care against the costs of institutional health services and home care will create an increasing need for services for aging-at-home seniors. Further, these seniors' children, who are their primary caregivers, have less time than their contemporaries to care for these aging adults. Given this

reality, and assuming state financial support continues, potential growth areas for MOWRI include:

- Expansion of meal services to age-at-home seniors, *in support of the children caregivers*, in those areas where new routes can be most efficiently established.
 - Work with the State to become the coordinator for all congregate programs.
 - Only add new services/products strategically and carefully and only after fully understanding the burden it places on the delivery system.
6. ***Experiment with — on a manageable scale — different meal delivery options*** such as letting clients select a delivery day; or having the meals all delivered on one day all with the goal of improving the quality of service without placing greater demands on the delivery system.

II. Branding and Marketing. MOWRI has an excellent reputation and the general perception of the organization is good. This is supported by a clean record of service over a long period of time. The brand is generally recognizable, although some consumers may not be clear on the organization’s mission and day-to-day operations. What is needed is a clearer, more modern and consistent message — one that communicates that MOWRI is about more than only delivering meals.

Strategy: Over the next two years, we will re-orient brand awareness to reach a new larger audience so that the target audience — caregivers, referrals and funding sources — can differentiate MOWRI from other local and national meal service organizations in terms of quality and diversity of services measured by an increase in public and private funding of 15 percent and an increase in customers’ referrals of 20 percent over the average number of clients served in the fourth quarter of 2015. This strategy will be monitored on a quarterly basis and a new goal will be set after the initial two-year period. This is based on 2015 funding, excluding the bequest amount and grants.

Actions to achieve strategy

1. ***Modernize the marketing mix and approach.*** There is a need to expand the scale of the marketing program to include new and larger channels; define the *priority* channels and consistently message to them, including:
2. ***Continue to increase communication with referral services with access to clients,*** communicating the improvements MOWRI is making, opportunities for increasing the number of clients (routes, new geographic areas, etc.); this communication should be systematic (not ad-hoc) and integrate with the Partnership efforts outlined below.
3. ***Communicate the impact MOWRI will have on the needs and expectations of the State.*** Make this a high-profile partnership that serves both MOWRI and the State leadership and communicate this regularly and broadly.
4. ***Create an organized approach to regularly touch new, potential referrals*** (caregivers, nursing homes, doctors, etc.) using new media and face-to-face contacts. Attend events and forums where these targets meet.
5. ***Increase general marketing reach to RI residents*** so they more clearly understand what MOWRI does and does not do (accomplished with the top level tasks).

6. ***Focus communication efforts on caregivers and those making decisions about clients*** (referrals) rather than the clients themselves. The caregiver component of this audience, generally labeled as generation X, is receiving much of their information online via outlets such as Facebook and Pinterest.

III. Partnerships. MOWRI has a narrow band of partners (a consistent but a small circle of funding groups) but has significant growth potential. It hasn't yet reached out to the blossoming local food movement or local Universities as a mechanism to raise awareness, brand recognition, and possible funding and as a source for future Board members.

Strategy: Increase awareness about MOWRI in the non-profit by delivering the message directly, face-to-face, at key statewide forums and meetings and by regular and systemized contact with the donor community. Success will be measured by the number of new individuals from the non-profit and donor community that proactively identify new partner opportunities with MOWRI.

Actions to achieve strategy

1. ***Deliver the message directly, face-to-face*** — share this message: “Here is who we are. This is what we do. This is how we want to partner with you” at statewide events and forums ***and*** meetings within MOWRI's existing geographic service areas. Take advantage of opportunities for face-to-face marketing with state leaders, partners, agencies, etc.
2. ***Build bridges to untapped nonprofit and food forums in the State*** that could be synergistic such as the RI Food Council, the RI Hospitality Association, and Johnson & Wales University College of Culinary Arts.
3. ***Continue to nurture and strengthen existing relationships.*** Donors reported that they were adequately informed and thanked by MOWRI, but noted several areas of expansion that would increase and improve information flow:
 - Cross-market their donor services and interests (e.g., @fundersname, thanks for your continued support. You just purchased another 5,000 meals for those in need).
 - Shorter and more regular updates that contain factual information about impacts.
 - Phone calls at least semi-annually and preferably every two months to larger donors.
 - Most donors know well what MOWRI does at its core, but want to know how it is growing, expanding, evolving to serve more people in need. They are also looking at how the message is being communicated and if the brand is “in circulation in the community.”
4. ***Seek out new donor sources*** through board members, existing donors and other new or existing partnerships.

IV. Evolve internal systems, structure and communication mechanisms to achieve growth

Strategy: Within six months of plan approval, review and begin implementation of a realignment of human resource capacity and assigned responsibilities for more efficient distribution of work between the MOWRI Director and staff to achieve strategic initiatives. Institute regular feedback loops with staff to address concerns, ideas and opportunities. Progress will be measured by having in place a

process to review and revise job descriptions on a regular basis to reflect MOWRI's evolving workload.

Actions to achieve strategy

1. ***Increase communications at all levels of the organization*** by encouraging a greater flow of information and soliciting and accepting more input prior to decision-making. Create opportunities for strategic conversations that support better operations.
 1. ***Solicit regular input from clients and funders*** so MOWRI can continually refine, improve and expand its offerings. Use this feedback to ensure that needs of the clients are considered while MOWRI is making operational and strategic decisions.
 3. ***Review the alignment of capacity, responsibly and needs*** — to ensure MOWRI's human resources are being efficiently focused.
 - Review this distribution of work at the director level and between the director level and staff to achieve a range of proposed strategic initiatives, moving responsibility for day-to-day delivery to experienced staff.
 - Review and revise job descriptions to reflect changing responsibilities and clarify individual roles.
 - As part of this process, specifically address time constraints on HD staff and their ability to meet forecasted demands.
 - Actively recruit volunteer drivers in anticipation of the retirement of the current group of drives and include this recruitment effort in marketing plans.
 4. ***Build a three-year funding projection*** that assumes worst, expected and best case scenarios for each major budgetary line item. For each scenario, suggest ideal unrestricted funding levels sufficient to support non-programmatic costs and how those funds could be allocated existing sources or acquired. This should be done by the leadership team and reviewed by the Board by the third quarter of each year.
- V. Re-institute an Active Nominating Committee to Improve Board Capacity.**

Strategy: As soon as practicable, re-institute an active nominating committee that defines capacity needs, clarifies the role of board members and, based on this assessment increases the size of the board to 11 in year one and to 15 by year two; it shall also re-institute term limits as of the February 2016 special elections to create a clear path for new board members to move into leadership positions.

Actions to achieve strategy

1. The board agrees that the future role of the board should expand to include lending their skills and experience to assist MOWRI in such areas as fundraising, establishing new relationships/connections and introducing MOWRI to new networks, embracing diversity, engaging stakeholders and enhancing operations (e.g., accounting), etc.

2. The nominating committee shall revisit the draft plan that was written to guide board development, and revise and implement this plan as a board priority. This effort recognizes that attracting and keeping new talent requires effort and multi-year attention.
3. The board agrees to simultaneously build its capacity in the areas defined above and re-institute term limits with the clear and explicit intent to allow directors who express an interest and hold the necessary skills to elevate to the executive team and eventually to the chairmanship. Codify this at the Special Board Meeting in the bylaws by adopting standard and generally acceptable term limits of three, three-year terms not to exceed nine years for directors; and two one-year terms for officers. These changes will be initiated at the February 2016 special elections.
4. The Board shall revisit the nominating process. It will institutionalize the preferred makeup of the board; who selects the board members; and the schedule for making nominations in the by-laws. This plan proposes that the past chairman of the board become chair of the nominating committee even if he or she has termed off the board and that the past chairman and the current chair select members of this committee. The makeup of the committee is by two members selected by past chair and three members selected by the current chair. In the event the nominating chair is unavailable to serve, the Board may select a chair. These changes will be codified in the bylaws at the special board meeting in February 2016.
5. Outgoing board directors will be invited to attend meetings so the membership has access to and can tap their wisdom and institutional memory on the history of MOWRI.
6. The chairman or the chair of nominating committee should seek to transition directors off the board voluntarily if they are not attending meetings and contributing to the strategic conversation. This action can be taken at any time, even if their terms are not ended.
7. The chair, vice chair, and Executive Director shall revise the board's regular agenda to move away from routine updates and instead focus its attention on the implementation of key strategic priorities as defined in this plan.
8. The Executive Director shall ensure through regular updates that board members are informed and able to serve as a 'face of the organization' to supplement staff efforts when required.