Meals On Wheels
LEADERSHIP ACADEMY

Making Informed Decisions to Build Capacity and Sustainability in Your Program

Presenters

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and Audrey McCool, EdD, RD, LD, FAND

Facilitator

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The webinar will begin at 3:30 p.m. Eastern Standard Time

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Program Outcomes

After participating in this program, you will:

- ✓ **Appreciate the need for conducting program assessments**
- ✓ **Differentiate between internal and external program assessment**
- ✓ **Describe the assessment process**
- ✓ **Consider known benchmarking characteristics in program assessment evaluations**
- ✓ **Identify trends occurring within HDM meals today**

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Quote for the Day

"Stay in the solution and your problems will die of neglect."

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Overview of Meals On Wheels SF
Nourish the Whole Person

- Delivery of 14 Meals Per Week to Each Client (Hot / Chill / Frozen)

- Well Being/Safety Check by Delivery Drivers

- Nutrition Education and Counseling

- Social Work and Case Management

- Support for Client Needs (Safety Focus /Quality of Life)

- Volunteers To Assist Clients

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Overview of MOWSF cont.

- **$10 million Budget**

- **57% Privately Funded / 43% Government**

- **3,400 Unduplicated Clients Annually**

- **Deliver 1.4 Million Meals Annually**

- **78 Full Time Employees / 25+ Subcontracting Employees**

- **Engage About 4,000 Volunteers Annually**

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Our Clients

- **67% live alone**

- **52% are women and 48% are men**

- **Age**   45% age 60 – 74 / 26% age 75 – 84 / 24% age 85+

- **Ethnicity -** Caucasian - 42% / African American - 29%
  - Hispanic - 12% / Asian/Pacific Islander - 14% / Other - 3%

- **67% on modified diets**

- **96% of consider themselves low income** and **75% live on SSI which is $850 or less per month**

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Current State

- **Since 2007 we have more than doubled in service in SF – 623K meals in 2007 – 1.4 million today**

- **We've expanded our volunteer services by 400%**

- **Ramped up our fundraising substantially**

- **Doubled the Social Work Team**

- **Created Efficiencies to Help Us Meet Demand**

MOWSF - Four Pillars of Success

- **Wait Time Not More Than 30 Days for Service; Emergency Need will Receive Services within 2-5 days.**

- **Quality Nutrition**

- **High Quality Relationships – Drivers / Social Workers / Volunteers**

- **Client Needs Beyond Nutrition, especially ensuring clients' safety in their homes.**

Current State

in·flec·tion point

- a point of a curve at which a change in the direction of curvature occurs.
- (in business) a time of significant change in a situation; a turning point.

The time of transition of company's competitive position that requires the company change the current path and adapt to the new situation or risk declining profits.

**For Us This is a Risk to Our Ability
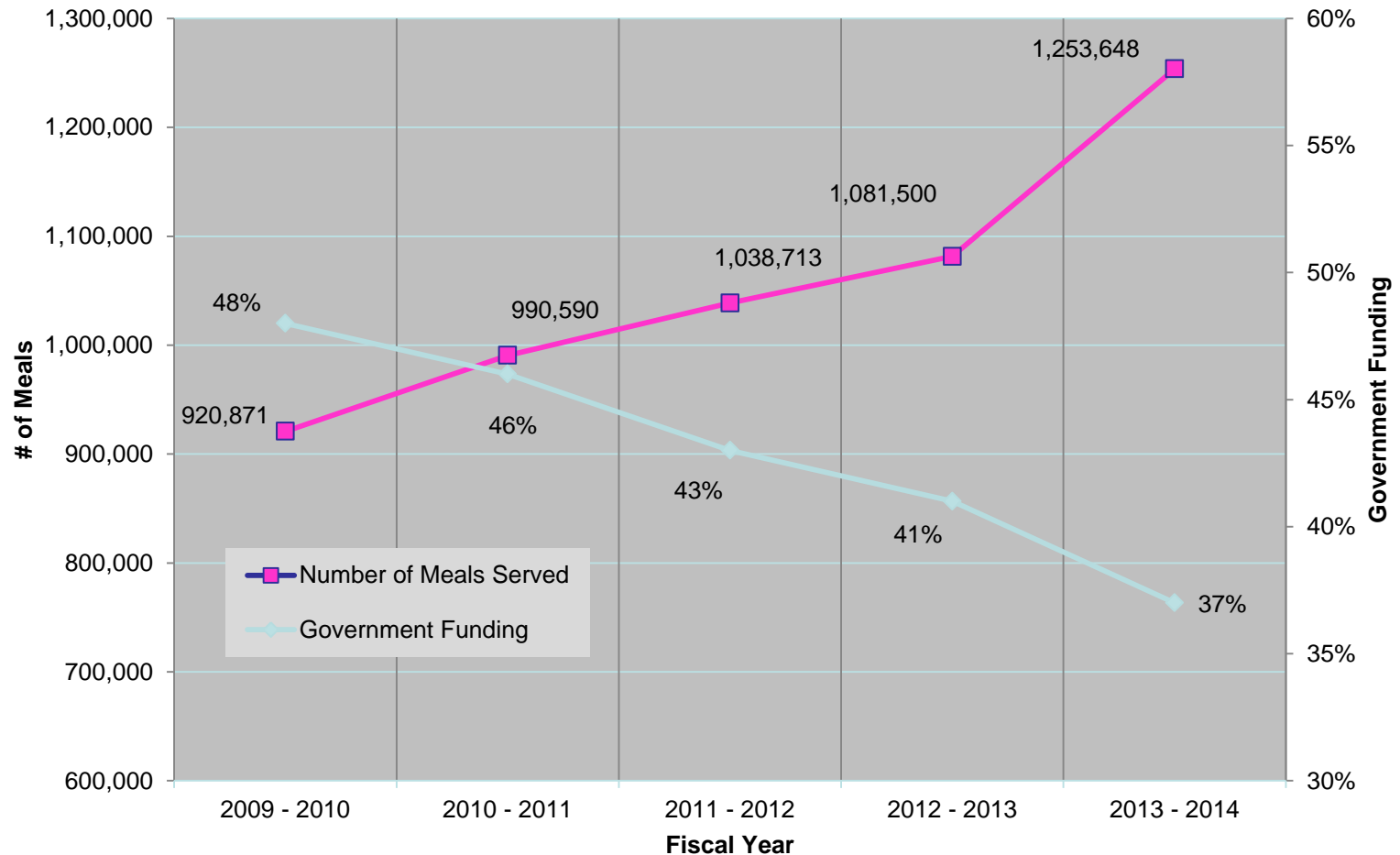to Meet Our Mission, Not Accumulation of Profit**

Why the Need for Change

- **Government Funding Not Keeping Up – Recent Gains, but …**

- **Fundraising Strong But Potentially Not Sustainable**

- **Boomer Wave Continues for Foreseeable Future and Clients Coming on Earlier – 11% growth each year for 3 years**

- **Need To Respond to Changes in Healthcare Landscape**

- **Taping into Reserves to Balance Growth**

- **Need a New Kitchen and Offices by 2019**
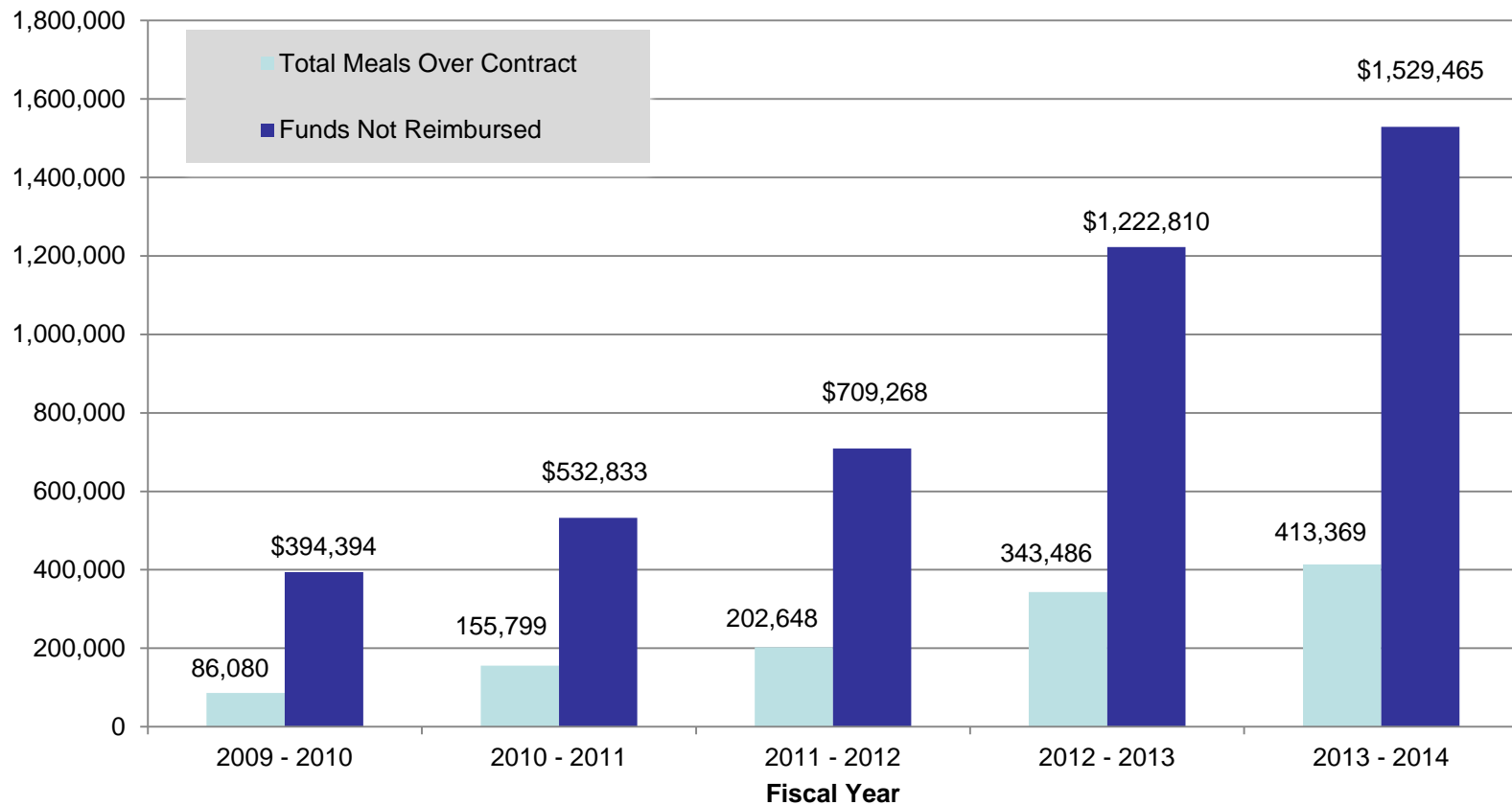
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GAP IN FUNDING MEALS

Chart legend:
- Total Meals Over Contract
- Funds Not Reimbursed

Fiscal Year	Total Meals Over Contract	Funds Not Reimbursed
2009 - 2010	86,080	$394,394
2010 - 2011	155,799	$532,833
2011 - 2012	202,648	$709,268
2012 - 2013	343,486	$1,222,810
2013 - 2014	413,369	$1,529,465

Need For Assessment

- **Needed Independent Review and Benchmark to Demonstrate to Board the Need for Change and Continued Growth**

- **Should We Continue or Current Kitchen and Food Strategy?**

- **Are We Competitive with Other Providers?**

- **When Do We Hit the Wall on Current Kitchen Production?**

- **Where's the Greatest Potential for Diversification of Revenue?**

Steps Taken in Assessment/Benchmarking

- **Called Meals On Wheels America for Recommendation for Consultant (June of 2013)**

- **Dedicated Resources to Consultant (FY'14 Budget)**

- **Engaged Dr. Audrey McCool (August 2013)**

- **5 month Process**

- **Full Presentation to the Board (January 2014)**

- **Board Retreat in May 2014**

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Additional Projects and Considerations

- **Deloitte Pro-Bono Consulting Team Provides a 24-month IT Roadmap / Plan (March 2014)**
    - **Streamline IT Solutions and Eliminate Duplication**
    - **Go Paperless**
    - **Be Data Driven – Prove Value / Make Better Investments**
    - **Be More Efficient**

- **Potential Formation of a MSO for San Francisco to Compete for Healthcare Contracts**

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Why Do Program Assessment

- **Determine where you are now – What's actually happening in your organization**
- **Identify how your organization is doing relative to other, similar organizations**
- **Identify existing/potential problems within your organization**
- **Identify existing/potential strengths within your organization**
- **Identify if your organization's mission/goals/objectives are being met**
  - **If not – why not??**

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Why Do Program Assessment

- **Identify potential opportunities for cost savings within the organization's operations**
- **Identify unmet needs for services within your community**
- **Identify potential opportunities for new revenue sources**
- **Justify the need for your organization to exist within your community**

Internal Assessment

ADVANTAGES:
- Can be done at any time
- Should reflect the organization's mission, vision, goals, and objectives
- Can be limited to and focused on a particular area of concern
- Less costly than an external assessment

Internal Assessment

DISADVANTAGES:

- May be biased from internal "politics"
- May be done to justify predetermined action
- May not "see the forest for the trees"
- Easy to never get around to completing
- May be discounted by the Board of Directors as a basis for decisions/action

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External Assessment

ADVANTAGES:

- Time frame planned for – so actually gets completed
- Outside review may identify problems/solutions not recognized by staff
- Reduces the possibility of a biased assessment
- Outside opinion often helpful in presenting problems/solutions to the Board of Directors
- Brings outside expertise into the organization
- Helps eliminate internal politics and/or friction among the staff

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External Assessment

DISADVANTAGES:

- Can be expensive – need to weigh cost/benefit of outside reviewer
- External reviewer may not understand the purpose (mission/vision/goals/objectives) of the organization
- May not be able to have assessment done in needed time frame
- Outside reviewer may not have appropriate experience/qualifications

Assessment Process

- **Identify concerns that are indicating the need for assessment**
  - **Discuss need for assessment with:**
    - **Staff (generally senior staff)**
    - **Board**
- **Determine the purpose of the assessment**
- **Be specific in what you want the assessment process to accomplish**
  - **May be focused on one particular area**
    - **Be prepared to find that the one focal area may lead to the need to assess related areas**
  - **May be broad-based**
    - **Multiple program areas**
    - **The program as a whole**

Common Program Concerns

NEW CHALLENGES:

- **Changing client demographics and expectations – the aging of the Baby Boomers**
- **Changes in family patterns**
- **Increasing marketplace competition**
- **Need to generate "profit" from new "lines of business" to have resources for programs**
- **Rapid increase in demand for services – especially home delivered meals**
  - **Need to find new ways to increase service capacity**
  - **Need for new revenue sources – no increases in government funding**

Common Program Concerns

NEW CHALLENGES:

- **Increasingly frail client population**
- **Clients who are physically challenged**
- **Increased disparity between fixed incomes and cost of basic necessities**
- **Need to provide more than 1 meal/day**
- **Increasing proportion of total population that is over age 60 – and over age 80**
- **Increasing client diversity**
- **Decline in interest in congregate meals**

Assessment Process

- **Understand the organization's vision and mission and the goals the organization hopes to achieve.**
- **Gather information from multiple sources. For example:**
  - **Organization chart and position descriptions**
  - **Policies and procedures**
  - **Contracts with outside organizations**
  - **Sample menus**
  - **Sample recipes**
  - **Historical records**
- **Conduct interviews with staff**
- **Observe the organization's operations**

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Compare Current Operations to Those of Other Organization's

- **Consider trends occurring**
  - **Within the surrounding community**
  - **Within Older Americans' Meal Programs**
- **Consider any benchmarking standards, where available**
- **Lack of benchmarking standards for Older Americans' Meal Programs**
  - **MOW of San Francisco's Board wanted benchmarking standards**
    - **Benchmarking study done relative to large home delivered meal (HDM) programs**

Benchmarking Characteristics

- **Lunch is still the predominate meal home delivered meal (HDM) programs serve their clients**
- **Most programs are delivering traditional hot meals to at least some of their clients, but many are no longer serving hot meals to all their clients**
- **Meals are generally delivered daily, Monday – Friday, with additional meals delivered at the end of the week for clients' weekend meals**
- **Programs generally provide modified diets for their clients**
  - **Most frequently provided modifications are diabetic, low sodium, and dental soft**

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Benchmarking Characteristics

- Most programs have a food production kitchen in their facilities
- Most programs operate their own kitchens
- If they do not operate their own kitchens, programs have a long-term relationship with the contractor operating their kitchen
- Programs often do not distinguish between their food cost per meal and their total meal cost
- Programs are not consistently calculating either food cost per meal or total meal cost

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Benchmarking Characteristics

- Although clients are encouraged to contribute toward the cost of their meals, many are unable to do so, and the average client meal contribution ranges from $.50 - $1.50 per meal
- Client contributions and private donations, while often low in amount, are the most frequently reported sources of program funds
- The largest proportion of funding for most programs comes from government sources, especially from federal program sources
- There are no established labor productivity standards for HDM programs

Benchmarking Characteristics

- **Volunteers are essential to most HDM programs**
  - Jobs that volunteers fill include delivery of meals, support of fund raising events, clerical work, and help with portioning and packing of meals for delivery
- **Many programs offer additional services to their clients**
  - Examples of such services are: nutrition education, nutritional status assessment, nutrition risk screening, nutrition counseling, and food assistance information
- **Many programs offer meals to disabled clients under age 60**
- **Some programs are doing outcomes measurement, but the outcomes being measured and the measurement parameters were not specified**

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Trends Within Large HDM Programs

- **Programs are increasingly offering a second meal to some/all clients**
  - Clients are becoming increasingly frail and less able to shop for food and/or to prepare meals for themselves
  - Clients are facing increased economic need as family caregiver support has been in decline
  - One meal is inadequate for meeting older person's basic nutritional needs
- **Programs are moving away from delivering hot meals and are increasingly providing frozen and/or chilled meals to clients**
  - Meal quality is higher with chilled and frozen meals
  - Meal delivery costs can be reduced when hot meals are not served

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Trends Within Large HDM Programs

- **Programs are providing meals for 7 days per week, although only a limited number do meal delivery 7 days per week.**
- **Programs are starting to provide an increased array of modified diets**
  - **Additional diets increasingly being provided are renal, gluten free, low fat, and vegetarian**
- **Programs are starting to offer cultural and/or ethnic meal choices, predominately Hispanic and Kosher meals**

Trends Within Large HDM Programs

- **Programs are starting to recognize the importance of outcome measurements for sustainment of funding support**
  - Programs are unsure about how to define appropriate outcome measures, data collection procedures to insure valid data collection, and data analysis
- **Programs are starting to recognize the need for partnerships and/or collaborative relationships with other types of organizations**
- **New programs that may be new revenue sources are being considered, but not without concern for problems/pitfalls associated with such efforts**

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Assessment Process

Final Stages:
- Analyze all collected information
- Consider organization vision/mission/goals/objectives relative to collected organization information
- Prepare report to include discussion of assessment process and recommendations relative to the purpose of the assessment
- Present report to organization administration

Assessment Process

Final Stages, Continued:

- **Discuss the recommendations and the rationale for the recommendations with organization administration**
- **Present report to the organization's senior management and possibly to the board**
- **Organization incorporates recommendations into strategic planning, as appropriate and/or works to implement recommendations, as appropriate**

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MOWSF - Results and Actions

- **Eye Opener for Board of MOWSF**
- **Board Adopts 5 Year Window for Kitchen/Building Solution**
- **Food Strategy Under Review, but Likely Modest Changes Until New Building**
- **Board Commitment to Invest in Business Acumen and Staffing – Hired First CFO**
- **Comprehensive and Ongoing Review of Operations and Assumptions**
- **Investments in IT / More Data Driven – Received Grant to Transform Client Data from Brin Foundation**
- **Started Search for New Home in SF**
- **Hired a Kitchen Feasibility and Design Consultant**

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Upcoming Webinars

Getting Your Volunteers Out of the Box
Presenter: Mary Beth Harrington
When: February 19, 2015
Time: 3:30 PM to 4:30 PM EST
Fee: $25
Competency: Organizational Planning
Concentration: Volunteer Management
Credits: 1

How to Do Social Media for Your Nonprofit in 15 Minutes a Day!
Presenter: Mazarine Treyz
When: March 10, 2015
Time: 3:30 PM to 4:30 PM EST
Fee: $25
Competency: Relationship Building
Concentration: Communications
Credits: 1