



September 12, 2019

Shannon Ketchabaw  
Executive Director

## Executive Summary

Meals on Wheels Strategic Plan has been developed with broad input from clients, family and care providers, members of the Board of Directors, volunteers and staff. In addition, congruence with the spirit, intent and legislation within the North East Local Health Integration (NELHIN) funding directives and the Ministry of Health and Long Term Care legislation and directives has been maintained.

The plan will help guide Meals On Wheels (Sudbury) through the next three years. It will provide direction for short-term and long-term goals for the Agency to operate optimally in the community in the years to come. Meals On Wheels (Sudbury) is continually improving and enhancing the services we provide to meet the ever-changing needs and expectations of our clients, caregivers, volunteers, and staff.

The intent of this strategic plan is to identify the current state of Meals On Wheels (Sudbury), the internal and external trends affecting service delivery and the action plans to insure that the agency remains sustainable while providing a valued service for the benefit of the clients, their caregivers, families, volunteers and staff.

Our vision must be recognized and continue for “all people of our community to have nutritious meals”. It is recognized that the success of this plan will require dedication from staff and board members to achieve the objectives and be reviewed regularly and updated as necessary.

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## **Overview**

### History

Meals on Wheels Sudbury was established as a grassroots pilot project in 1971, with the intent to keep people independent in their homes by supplying daily hot nutritious meals. Today, Sudbury Meals on Wheels serves hundreds of residents delicious and healthy meals in line with a mission to assist those in need of nutritional support; either short term or long term.

### Major Products and Services

Meals on Wheels helps clients maintain independent living and offers services to those who are unable to shop for food or cook for themselves by delivering well-balanced, delicious and affordable meals. Services are extended to a variety of clientele including: seniors (65+), the chronically ill, caregivers, persons with disabilities, individuals requiring convalescent care, persons with mental illness, new mothers (parents) and the terminally ill.

To the clientele identified above, Meals on Wheels offers a hot meal program (HMP) or a home meal replacement (HMR) service. The HMR service delivers frozen meals that are ordered and available for pick-up/delivery on a rotating weekly schedule.

Meals are delivered to the clients home from Monday to Friday and between the hours of 10:30 am and 1:00 pm. There is no meal delivery on statutory holidays and clients are reminded of dates prior to, and are offered a home meal replacement.

Meals on Wheels staff and/or volunteer drivers have the right to refuse driving when road conditions and weather conditions may cause harm or an unsafe environment. Clients are notified of delivery cancellations and will not be charged for meals that have not been delivered under these circumstances.

Meals on Wheels operates under the following legislation and regulatory bodies: the Ontario Ministry of Health and Long Term Care Community Support Service Meal Regulations, the Sudbury and District Health Unit Food Inspection Division (specifically the Ontario Health Protection and Promotion Act), Meals on Wheels operational policies and the Ministry of Labour Safe Workplace Safety Division. In addition, Meals on Wheels has regular inspections as an outcome of daily quality control policies and procedures.

### Major Highlights

November 1971 – Meals On Wheels (Sudbury) began as a grass roots pilot project serving 10 clients

1993 – The vision of a social enterprise as a means to supplement revenues was realized and Home Of Our Own Catering was born

2012 – Dragon Boat Festival made the agency the recipient of all funds raised and \$70 000 was donated to the agency allowing for aging equipment in the social enterprise to be replaced

2013 – New modernized website was launched; implementation of a client-centered organizational structure

2014 – Reinvented brand of Home of Our Own Catering and an expanded revenue margin of 158% more than in 2013

2015 - A new record number of clients 465 were reached; new van was purchased for Home of Our Own to assist with deliveries; acceptance as a funded agency of United Way for the first time in over 40 years

2016 – 45<sup>th</sup> anniversary of Meals On Wheels (Sudbury) was celebrated

2017 – Increased the subsidy program for clients

2018 – Funds granted for a new strategic plan

2019 – New leadership team began with Meals On Wheels (Sudbury)

### **Strategic Planning and Execution – Process Overview**

Throughout the strategic planning process, care was taken to involve the Board of Directors, staff and administration, volunteers and recipients of the service (and their family). Previous strategic plans were reviewed as were annual reports, financial information and survey data of staff, volunteers and clients.

The first step in the analysis was to conduct a ‘situational analysis’. Meetings were held to examine the internal and external environments that Meals on Wheels operates within. A full strengths, weaknesses, opportunities and threats (SWOT) analysis was undertaken (EXHIBIT 1). At the same time, meetings occurred to examine the external environment and determine possible threats and opportunities (ETOP) faced by the organization (EXHIBIT 2).

The existing core values, vision and mission of the organization were reviewed with broad confirmation that they were still relevant and supportive to the long term goals and priorities of the organization.

The next stage in the strategic planning process was the development of key priorities the organization wanted to achieve over the next three years. In light of significant uncertainty in the health sector, including but not limited to the transition from Local Health Integration Networks to the new Ontario Health Teams, it was difficult to justify a five year strategic focus. Regardless, this plan represents a working document and strategic priorities, strategies and related tactics may well extend beyond the three year window should management agree that they are still relevant.

Once the priorities, strategic initiatives and related tactics and initiatives were developed and staged across the three year timeline, key metrics and targets were established to track outcomes and evaluate the efficacy of organizational efforts aligned with specific tactics. The opportunity to assess and measure progress (or lack thereof) on strategic tactics is key for the organization and it’s people and clients to understand the reason and outcome of new ventures, changes in services and policy. To this end, the strategic plan includes a significant focus on operationalization.

### **Philosophy**

#### Vision

A community where all people have access to nutritious meals.

#### Mission

Meals On Wheels is a community-focused organization embracing volunteerism in the provision of nutritious meals and services.

## Values

Collaboration: We are committed to working with others to build a healthy community

People: We are committed to supporting the collective value of our clients, volunteers and staff

Wellness: We are committed to pursuing individual and community health and well-being

Sustainability: We are committed to pursuing and maintaining an adaptable and accountable organization

## **Analysis**

### Environmental Threats and Opportunities (ETOP)

An analysis of the environment within which Meals on Wheels operates was undertaken. Six key aspects were considered in an effort to inform the development of operational considerations in line with external forces: economic factors, political factors, social factors, technological factors, competitive factors and geographic factors. A ranking was then undertaken with each factor, estimating the impact of that factor as well as its' importance to Meal on Wheels. Impact ranking ranged from a rank of zero (strongly negative) to ten (strongly positive). The importance ranking ranged from a zero (unimportant) to ten (very important). On analysis (EXHIBIT 3), three key areas were highlighted.

Social factors returned the highest score (opportunity) and considered environmental pressures like age distribution, geographic distribution and income distribution. The Sudbury region is seeing an increase in its' vulnerable population. It has a broad geographic distribution of existing and potential clientele, and the agency is seeing an increased demand for its' subsidized meals program.

Technological factors returned the second highest score (risk) and relates to technological changes and development and raw material costs. The existing equipment within the organization is aging and in the absence of a capital risk management program. The use of technology for data acquisition and analysis is under-utilized.

Economic factors also represent a environmental threat. Raw material costs, predominantly food and gasoline, have not been met with off-setting cost increases to the product. The agency faces an aging volunteer base without any significant replenishment from younger individuals. While philanthropic activity remains strong in the region, the way people volunteer needs to be better understood if Meals on Wheels is to access and retain this vital resource.

### Internal Analysis – Strengths, Weaknesses, Opportunities and Threats (SWOT)

Meals on Wheels held two strategic planning sessions involving representative members from the Board, administration, staff, volunteers and family members (strategic planning committee). The committee was asked to identify those areas that it saw as strengths, opportunities, weaknesses and threats to Meals on Wheels. At the same time, the committee was asked to identify key aspects of a new 'future state' for the organization. Responses were sorted under the organizations 4 pillars of marketing, human organization, social responsibility and business innovation. (EXHIBIT 4).

Discussions around 'future state' really spoke to the organizations awareness of its' social responsibility. The committee was committed in its belief that Meal on Wheels will be the leading agency in meal

delivery to clients. There was also a strong commitment that clients will be served in all areas of Greater Sudbury effortlessly by volunteers and that vulnerable clients would get priority. Along with social responsibility, the other main aspect of the organization's future state would be related to its' sustainability. Meals on Wheels was to be a sustainable organization where volunteers and staff would work to be a part of a larger service; one with and increased client and volunteer base.

### Financial Analysis

Operating statements were reviewed. An attempt was made, with some assumptions, to separate fixed costs from those costs that would vary with the production of meals and service delivery (EXHIBIT 5). When compared to 2016 financials, it is obvious that the larger negative variances include wages and benefits (due in part to legislative changes – Bill 148), the implementation of meal subsidies, and food costs.

The estimated cost per meal was estimated at \$13.70 in 2019, \$1.67 above 2016 costs. The current cost per meal is \$5.70 above the currently charged rate of \$8.00 per hot meal. While these costs are estimates, the agency has not increased its' pricing on meals for some years.

Subsidy programming is widely seen as a necessity for low income clients and is fully supported as a strategy of the organization. As subsidized programming is extended, the agency will have to look for additional revenue sources to cover the variance.

## **Strategy Development**

### Preamble

Throughout the strategic planning sessions, there has been an on-going focus on four basic pillars: Marketing, Human Organization, Business Innovation and Social Responsibility.

The 'human' aspect of Meals on Wheels cannot be underestimated. Meals on Wheels is first and foremost a vital health service that is delivered predominantly through the selfless efforts of volunteers supported by staff. Any strategic initiatives must be tempered by an awareness of the 'human' aspect of the organization and its' services.

The concept of 'innovation' will be at the forefront of any strategic business venture. The Agency's funding is not adequate to support expansion and service growth within opportunities dictated by demographic projections (EXHIBIT 6). The ability to increase services while maintaining or decreasing costs will require innovative solutions and strategic partnerships.

Social Responsibility must be threaded throughout the planning and operational implementation of the strategic plan. The agency's social responsibility focus is best described by its' value statements, vision and mission (EXHIBIT 7)

From a marketing/messaging perspective, we need to ensure that our brand position and messaging will reflect our new goals and objectives and support a strong, consistent stakeholder communication platform.



### Key Priorities

Meals on Wheels is faced with a changing environment and must adapt to ensure it remains relevant, sustainable and client focused. To that end, the organization will pursue new opportunities to increase revenues within its core business as a strategy to extend services and support sustainability. In addition, the Agency is well aware of the value of services that it provides. It is imperative that Meals on Wheels remains client focused and prepared for the increasing (and changing) demands of our client base. Finally, the organization will explore avenues to extend business opportunities for its' social enterprise with the direct goal of increasing revenues in support of core services. Therefore, the organization, as a result of discussions, environmental and internal analysis, a review of financial and operational challenges, has chosen the following key priorities:

*Client Service Priority:* To support, extend and grow programs and services in alignment with client, community and legislative demands.

*Staff and Volunteers Priority:* To support a workplace that attracts, retains, develops and rewards our people.

*Community Awareness Priority:* To establish and extend a broader awareness of, and connection to, our programs and services.

*Financial Sustainability Priority:* To initiate and strengthen financial systems and metrics to support the organization and its mandate to deliver and grow sustainable programs and services.

### Strategy

The financial sustainability priority is foundational to the other three priorities and all strategies, tactics and initiatives flowing from those priorities as required to successfully implement the strategic plan.

Key to financial sustainability is the establishment of budget processes, a strengthened cost awareness across the organization, the ability to develop and interpret projections for cost analysis, new market development, new funding, pricing etc., and the development and implementation of a risk management system to systematically manage capital, operating and environmental risks under a consistent methodology and supportive to sustainable services

Strategies supportive to client services is the development and consistent application of client feedback mechanisms that allow for the collection and analysis of data for trends, client satisfaction and new and emerging services and other opportunities. Product and service flexibility as it relates to alternate delivery times, alternative ordering platforms and customized menu choices will be explored. Volunteer training and development programs are supportive to client services and will include the development and delivery of programming related to home safety assessments, handling complaints, safe driving and other volunteer-client relevant topics. The organization will expand its' use of resourced information, metrics, data analysis and research to ensure alignment with best practice(es), community and client demands and new and emerging opportunities. Meals on Wheels will explore opportunities to extend operations geographically and increase delivery options to 5 days/week to clients in distant communities. The organization will review Home of our Own operations and explore new opportunities and markets with the goal of increase revenues through a sustainable and supported growth of profitable services.

Community awareness of the programs and services delivered by Meals on Wheels needs to be improved. The heightened awareness will be driven by a marketing strategy to strengthen the organizations' brand, extend and expand marketing platforms (website, facebook, LinkedIn etc) and attract new/more favorable media coverage. Meal on Wheels will also develop networks for awareness, fund development and co-supportive services. Alumni, past board members, volunteers and clients/family members will be resourced and become a strengthened part of the organization's extended network. Once the messaging is established, an advertising strategy will be undertaken supportive to brand and service awareness to increase uptake of new clients. The community needs to be aware of the agency's commitment to being environmentally responsible in its packaging and its' on-going efforts to increase the use of biodegradable packaging for the product.

Staff and volunteers are the workforce that makes Meals on Wheels successful. The organization will undertake recruitment and retention strategies including; training and development opportunities, a rewards and recognition program and an extended and supportive network for volunteers. A positive workplace environment will be strengthened by open communications and feedback mechanisms, staff and volunteer satisfaction/suggestion surveys and policies supportive to a workplace supportive to its' people. The agency will source new volunteer markets, coop placements and students as a resource to assist in the delivery of services and products but more importantly, as a place to learn new skills.

## **Implementation**

### **Stage 1**

The first step in the implementation process was a priority ranking of the key priorities by the board of directors. Once the priorities were ranked, a second priority ranking was undertaken on the established strategies under each priority. This process was undertaken to allow the management and staff the opportunity to plan and prioritize their efforts, time and more importantly, financial resources that may be required to activate the plan. The results of the prioritization exercise are attached (EXHIBIT 9).

### **Stage 2**

The second step in the process was to broadly plan out the timelines for implementation on the key priorities and their underlying strategies (EXHIBIT 10).

### **Stage 3**

The third step in the process will be to take the priorities and strategies back to the staff and managers at Meals on Wheels and allow them the opportunity to consider each strategy relevant to their area. More importantly, they will have the opportunity to discuss and posit strategic tactics and initiatives to achieve the strategy (ies) and collaborate on the development of specific metrics to quantify progress. This step is a key to successful operationalization of the strategic plan over the next three years and will benefit from additional funding to support the processes itemized (EXHIBIT 11).

## **Conclusion**

Meals on Wheels strategic plan is the result of input from staff, volunteers, administration, clients and their extended family, care providers and the agency's Board of Directors. It represents an actionable plan, one crafted to support and advance core services to the communities served in a planned and sustainable manner. The document is, as such, a working document that must be considered in light of environmental, social, legislative and other changes that are an inherent part of any health service. The flexibility is inherently a part of the strategy as presented.

## Exhibits

**Social Responsibility****Client Focus**

- Long history of service in the community
- Small administration so focus on clients and not the corporation
- IR Assessments
- Clients always come first
- Accessible
- Home visits, help to understand clients needs individually and as an organization
- Clients can call directly for service

**Client Options**

- Seeing every client through, first visit, annual visit, call ups
- Promoting other community services and programs to our clients, helping clients find support for their safety and health
- Offering diverse programs to our community
- Working with other community services and program to better our agency and our community
- Meals ready when stated
- Frozen meal program - allows us to reach further
- Client options

**Quality Service**

- Defined plan in food prep and delivery protocol
- Well portioned and priced meals
- Affordable meals for elderly clients
- Subsidy program
- Home cooked meals
- Meals are accomodated to dietary requirements
- Adhering to Canada Food Guide
- Food subsidy program
- Great way to alleviate stress from caregivers
- Service reliability
- Product (food) consistency
- Meals delivered daily
- Cooked from scratch
- Meals are good

**Human Organization****Management and Staff**

- Multiple roles per staff
- Problem solved quickly
- Fresh management/team - Bring fresh/new ideas
- Open leadership - b/t staff and management
- Multi-tasking between kitchen/admin teams
- We have a great team
- Wonderful staff, easy to talk with and deal with
- Dedicated staff
- Strong team
- Teamwork
- Staff - energetic, willing, determined, determined, friendly
- Kitchen staff are great
- Competent qualified staff

**Volunteers**

- Amazing volunteers
- Board commitment
- Volunteerism - delivery
- Dedicated volunteers
- Volunteers are great

**Marketing****Funders**

- Funders
- Community awareness
- Well known in the community
- Community recognition/awareness/engagement
- History
- Community standing
- Corporate history
- Our history

**Business Innovation****Social Enterprise**

- Own kitchen
- Social enterprise

**Set Standards**

- Set standards for other agencies
- Grassroots organization

**Marketing****Brand Awareness**

- Branding not strong, need better presence in community
- Media coverage
- Community knowledge
- Marketing of the program
- Location visibility
- Street Signs
- Not enough advertising
- Marketing , promotion, awareness
- Lack of fundraising

**Social Responsibility****Client Diversity**

- Client diversity
- Possibility change menu items occasional for regular permanent customers

**Business Innovation****Large Geographic Area**

- Attracting new and younger volunteer base
- Routes (not enough, too many clients on some, some routes do not get 5 times a week due to the lack of volunteers)
- Large geographic area to serve
- Decreasing volunteers
- Not all communities able to get hot meals every day of the week
- Routes (more needed)
- Need to expand service area

**Social Responsibility****Pricing**

- Pricing/funding incentives for clients meals
- Product (Food) diversity - packaging

**Human Organization****Experience/Workload**

- Understanding individual and group roles
- Finding consistent workers to limit turnover
- Workload
- Experience at Meals on Wheels
- Staffing stability in kitchen

**Volunteers**

- Volunteers
- Lack of volunteers
- Volunteerism, aging demographic
- Declining volunteers (deliveries/board)/funding

**Marketing****Fundraising/Networks**

- Funding relies on much of some sources over and over driving fatigue
- Keep costs down - food and gas
- Resources (staff, money, inter-agency relationships, funding)
- Decreasing donations
- Community ties - connections
- Funding, uncertainty
- Needing more advertizers

**Business Innovation****Customer Awareness**

- NESDA (financial application)
- Application process/screening
- Additional info before visits - volunteers unaware of conditions of home if visit has not been completed yet

**Social enterprise**

- Home of Our Own overwhelmed

**Marketing****Branding**

- Increase community ties and knowledge
- Building a known network
- Coop placements for solving staffing issue
- Rebuild relationship with donors
- Rebranding to increase awareness of the programs
- Work with other services and program (not for profit) to see what works or them
- Marketing and communication program, consistency of message
- Signage at Bancroft
- Agency marketing/branding for awareness
- Recognized in community
- Advertise and promote

**Business Innovation****New Business Development**

- Grow Home of Our Own
- Subletting kitchen on offtime
- Home of our Own Connection - other non-profits, schools, Gov't Services
- New Funding revenue stream (food truck, local events, teaching kitchen)
- Home of our Own kitchen expansion (taking on new catering contracts)
- Increasing profitable revenue through kitchen and additional clients
- Home of our Own expansion - space/area
- To grow as an organization

**Social Responsibility****Grow Ethnic/Services**

- Expand to outlying areas
- Ethnic clients
- Francophones
- Deliver meals 5 days/week to all communities
- Greater diversity of menu - vegan, vegetarian
- More clients through media coverage
- Client diversity, new clients
- Expand to outlying areas
- Growth (more clients, volunteers, delivery areas)
- Serve diverse cultures

**Human Organization****Grow Volunteers**

- Increase volunteers
- Partnerships with schools for volunteers (maybe even other organizations)
- Keeping former board members in the loop and involved (currently no communication with former board members)
- New board members
- get out and make connections....work with the people we have

**Business Innovation****New Partners/fundraising**

- Icon sales with grocery partner for fundraising
- Barter bank for services
- Using lotto license for fundraising
- Partnerships with other organizations - both funding and service based

**Financial**

- Budget reviews

**Risk Management**

- Develop a risk management program
- Updated equipment/savings

**Political**

- Ontario Health Team
- One Client One Plan (OCOP)

**Environmental Responsibility**

- Packaging - environmental sensitivity

**Business Innovation****Increasing Costs**

- Gas prices
- Food prices
- Cost/inflation
- Funding
- Loss of funding - not only Ontario Health Team but private donors

**Supply Chain**

- Frozen meal delivery from new market ie: changes to company or route

**Social Responsibility****Client Issues**

- Lack of volunteers
- Coverage required in Killarney
- What if clients demands increase beyond our capabilities/capacity
- Changing needs of clients (food preferences, meal accommodations)
- Aging population dying off while new recipients not getting Meals on Wheels
- Decreasing clients
- Millennials and next generation may not be as engaging in communities (volunteers)

**Business Innovation****Competition**

- Increased competition for volunteers
- Competition - private sector
- Competition
- Competition
- Private competition (catering companies)

**Risk Management**

- Company vehicles
- Office space
- Building
- Unknown threats - weather, utilities breakdowns
- Lack of risk management
- Risk of property (vans, kitchen equipment, aging software, and laptops/computers)
- Loss of lease
- Old equipment/another break-in (unexpected expenses)

**Human Organization****Staffing**

- Workload
- Lack of kitchen staff
- New staff

**Business Innovation****Political**

- Ministry funding
- Ontario Health Team
- Next government election (what changes next)
- Stability

**Technology**

- Banking/pament (need new method, ie: online banking)



### **Economic Factors**

*(includes: business cycle, inflationary trends, consumption, employment, investment, monetary and fiscal policies)*

- increasing food and gasoline costs
- aging volunteer base
- changing philanthropic philosophy

### **Political Factors**

*(includes: political power, different ideologies, interest groups, social stability, legislation and regulations)*

- Fair Workplaces, Better Jobs Act (Bill 148)
- Ontario Health Team

### **Social Factors**

*(includes: age distribution, geographic distribution, income distribution, mobility, education, family values, work and business attitudes)*

- increasing vulnerable population
- coverage required in distant areas ie Kilarney area
- increased demand for subsidy program

### **Technological Factors**

*(includes: rate of technological change, future raw material availability, raw material cost, technological developments in related areas, product life cycles)*

- repair/replacement of aging equipment
- lack of awareness on existing technology platforms
- adoption/implementation of new technologies/software

### **Competitive Factors**

*(includes: entry and exit of major competitors, major strategic changes by competitors, competition size, number, capacity, location, methods, production/market segments)*

- increasing competition for volunteers
- well established private sector catering community in Sudbury
- Ontario Health Team - who will be providing what service

### **Geographic Factors**

*(includes: plant/warehouse location, relocation of facilities, headquarters, foreign markets)*

- coverage required in distant areas ie Kilarney area
- large geographic area to service
- a nodal service network does not exist

Factors	Impact of Factor	Importance of Factor	Environmental Threat/Opportunity
Economic	3	8	24
Political	2	7	14
Social	7	9	63
Technological	5	8	40
Competitive	3	3	9
Geographic	3	4	12

Impact: from 10 (strongly positive) to 0 (strongly negative)

Importance: from 0 (unimportant) to 10 (very important)

**Vision/Mission**

Meals On Wheels will be a sustainable organization  
 Clients of Meals On Wheels will be served in all areas of Greater Sudbury effortlessly by volunteers  
 Meals on Wheels strengthened and better supported with OHT  
 success

Meals on Wheels will be an integral part of the Ontario Health Team by increasing its street presence by advertising/ branding. Developing new partnership with other agencies will solve need for labour and volunteers while developing new source of recipients. I want Meals On Wheels to be at the forefront of thinking when discussing nutrition in public. This would strengthen our current mission of accessibility of a nutritious meal for all.

**Priorities****Marketing****New fund development**

Increase funding  
 I'd like to see a 20% increase in fundraising over 3 years  
 Lottery license - being profitable for organization

**Branding**

Meals On Wheels is an organization that is recognized as the "go-to" organization for enabling citizens to remain in their home through the provision of healthy meals and regular contact with volunteers  
 Being more of a household name  
 Organization rebranding  
 Well-known/good community ties  
 More public events (cruise, presentations, bbq)  
 Engaging in more community events  
 More advertisement street signs  
 More old board/donor member meetings/ meet and greet to keep connections

**Human Organization****Staff/Volunteer Development**

More square footage dedicated to volunteers than anywhere else  
 Excess volunteers  
 Volunteers increase by 25%  
 Increased volunteer base  
 Sufficient volunteers  
 Student placements (marketing, program evaluations etc)  
 Increased donors

**Business Innovation****Performance Indices**

Client surveys for preferences ie: like/dislikes/ideas  
 All MOWs to have same standards (cost, nutrition, meal components)  
 Sustainable clients

**Strategic Partnerships**

Partner with other well known non-profit (H&S, CNIB) for media coverage and reliability (ie: nutritious meals, health @ heart health)  
 Partnership with other community services and programs  
 Stronger ties within the community  
 More partnerships with other services

**Operations**

Catering (Home of Our Own) reopen completely  
 Meals on Wheels will be the leading agency in meal delivery to clients  
 Offer meals to anyone but change non-vulnerable clients increased fees  
 Vulnerable clients get priority  
 Expanding Home of Our Own or subleasing space for profitability  
 Risk management plan in place  
 Online ordering to reduce call volume  
 Meals on Wheels catering event and conferences  
 Maintain quality of food  
 Maintain excellent staff  
 Competitive delivery stipened in comparison to areas travelled (eg. Sudbury Route 15 meals @ 100kms to Route 15 meals @ 2km paid same \$)

**Social Responsibilities****Expand Routes/Deliveries**

Additional routes serving Greater Sudbury and outskirts at least 3x a week  
 Serving more ethnic and francophone populations  
 All clients from all community receiving full Meals on Wheels services, Hot meal/home meal replacement programs 5 days a week  
 All clients in City of Greater Sudbury offered meals 5 days a week  
 Increased area delivery  
 Increased client base  
 Offer meals to ALL people in the community

# Meals on Wheels - Financial Analysis

## Exhibit 5

2019 2016

### Revenues

Ministry of Health/Northeast LHIN	443,127	434,437
Earned Revenues (Meals on Wheels/Home of Our Own)	<u>592,388</u>	<u>507,271</u>
	1,035,515	941,708

### Fixed Costs

Employee Wages and Benefits	335,348	289,947
Other Costs	71,776	80,165
Building Occupancy	36,578	39,096
Agency Supplies and Equipment	26,039	45,727
Staff Training, Travel and Meetings	<u>17,392</u>	<u>21,638</u>
	487,133	476,573

### Variable Costs (est Cost of Goods Sold)

Food Costs	271,372	260,591
Home of Our Own Employee Wages and Benefits	183,566	142,696
Volunteer Travel and Recognition	18,455	17,798
Meals Subsidy	14,288	228
Agency Supplies and Equipment	<u>12,038</u>	<u>9,973</u>
	499,719	431,286

### Excess of Revenues over Expenditures

	<u><u>48,663</u></u>	<u><u>33,849</u></u>
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Estimated Cost of Goods Sold	499,719	431,286
total meals served	36,484	35,860

est. Cost per Meal \$ 13.70 \$ 12.03

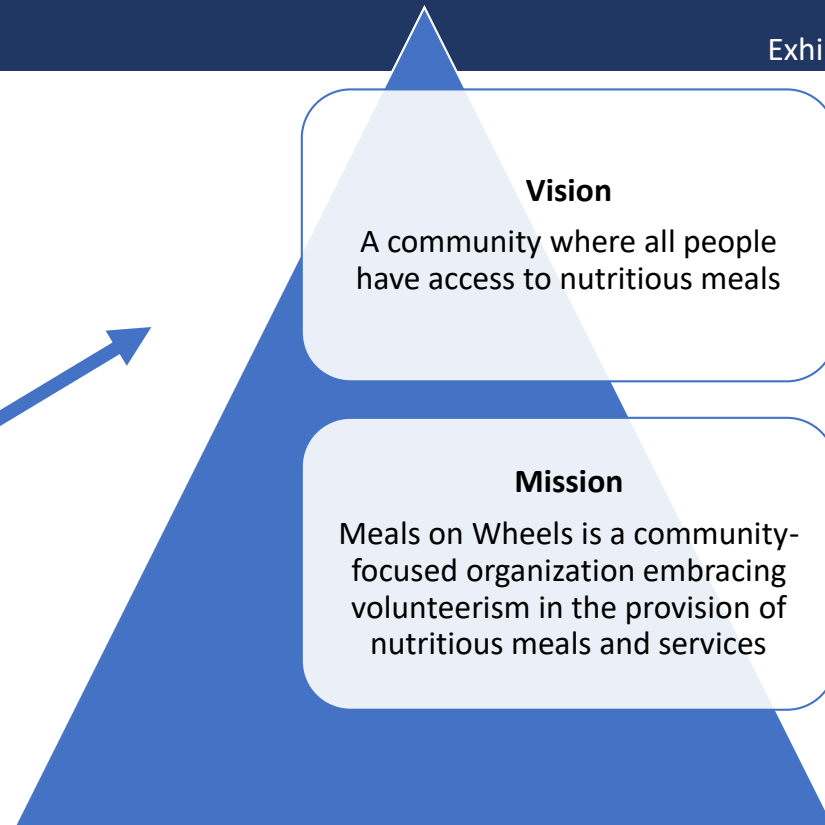
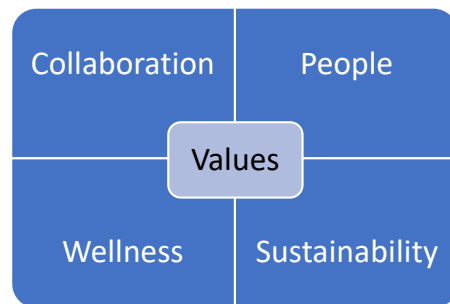
2016 - 161,647

**Senior's Density by Community**

Community	55- 64	65 - 84	85+ seniors (65+)	65 + Low Income	
				Total	%
New Sudbury	3,500	4,640	890	5,530	380 6.9%
South end	3,435	4,185	765	4,950	360 7.3%
Minnow Lake	415	1,455	320	1,775	190 10.7%
Flour Mill	1,240	1,355	245	1,600	335 20.9%
West End	1,070	1,210	300	1,510	155 10.3%
Chelmsford	105	1,200	135	1,335	125 9.4%
Kingsmount	3,010	1,040	150	1,190	205 17.2%
Val Therese	1,075	975	110	1,085	30 2.8%
Val Caron, Blezzard, McCre Heights, Guilletville	875	880	85	965	80 8.3%
Hanmer	790	770	45	815	85 10.4%
Garson	855	760	50	810	60 7.4%
Donovan	775	670	100	770	145 18.8%
Azilda	780	685	75	760	60 7.9%
Lively	650	625	70	695	65 9.4%
Capreol	465	480	55	535	50 9.3%
Copper Cliff	300	365	80	445	30 6.7%
Coniston	310	350	55	405	35 8.6%
Dowling	160	285	15	300	20 6.7%
Levack-Onaping	200	190	20	210	25 11.9%

**Senior's Density by Low Income**

Community	55- 64	65 - 84	85+ seniors (65+)	65 + Low Income	
				Total	%
New Sudbury	3,500	4,640	890	5,530	380 6.9%
South end	3,435	4,185	765	4,950	360 7.3%
Flour Mill	1,240	1,355	245	1,600	335 20.9%
Kingsmount	3,010	1,040	150	1,190	205 17.2%
Minnow Lake	415	1,455	320	1,775	190 10.7%
West End	1,070	1,210	300	1,510	155 10.3%
Donovan	775	670	100	770	145 18.8%
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Dowling	160	285	15	300	20 6.7%



## Financial Sustainability

To initiate and strengthen financial systems and metrics to support and grow sustainable programs and services.

### ***Financial Sustainability - A Foundation of our Strategic Tactics and Initiatives***

#### ***Establish Budget Processes***

*implement standard budget processes*

#### ***Strengthen Cost Awareness***

*costing analysis tied to operations/growth*

*barter bank*

#### ***Develop/Strengthen Projections***

*projection strategies for new markets, new funding and new donor sources*

#### ***Pricing Decisions***

*ensuring that meal costs reflect current market pricing*

#### ***Risk Management***

*systematically manage capital, operating and environmental risks in a method supportive to sustainable services*

## Client Service Priority

To support , extend and grow programs and services in alignment with client, community and legislative demands

#### ***Establish On-going Client Feedback Mechanisms***

- implement consistent stats for client needs and requests

#### ***Enhanced Product and Service Flexibility***

- alternate ordering options (themed and custom meals)
- alternate delivery times

#### ***Volunteer Training and Development***

- initiate training and development opportunities for; volunteer roles, safe driving, home safety assessments, client complaints etc.

#### ***Enhanced Communication***

- utilize a variety of platforms to enhance both internal and external

#### ***Research***

- expand the use of resourced information, metrics, data analysis and

#### ***Extend Geographic Service Area(s)***

- extend meals delivery to 5 days/week in distant communities

#### ***Grow 'Home of Our Own' revenues and explore new markets***

- sustainable and supported growth in profitable services

## Community Awareness

To establish and extend a broader awareness of, and connection to, our programs and services

#### ***Strategic Marketing***

- develop 'brand'
- establish key targets and messages
- expand marketing platforms (website, facebook, LinkedIn etc)
- attract new/more media coverage
- better services pitch/elevator pitch

#### ***Fundraising/networks and Alumni***

- extend opportunities for awareness, networking and fund development

#### ***Rebuild relationships in the Community***

- donors
- past board members

- volunteers

#### ***Advertising Strategy***

- strategic advertising to support brand and service awareness/growth

#### ***Environmental Responsibility***

- actively reduce our carbon footprint in line with UN global initiatives

## Staff and Volunteers Priority

To support a workplace that attracts, retains, develops and rewards our people

#### ***Recruitment and Retention***

- training and development opportunities
- rewards and recognition programs
- create and extend networks (volunteers)

#### ***Positive Workplace***

- open communications/feedback mechanisms

- opportunities to voice opinions and suggestions

- surveys and complaint policies

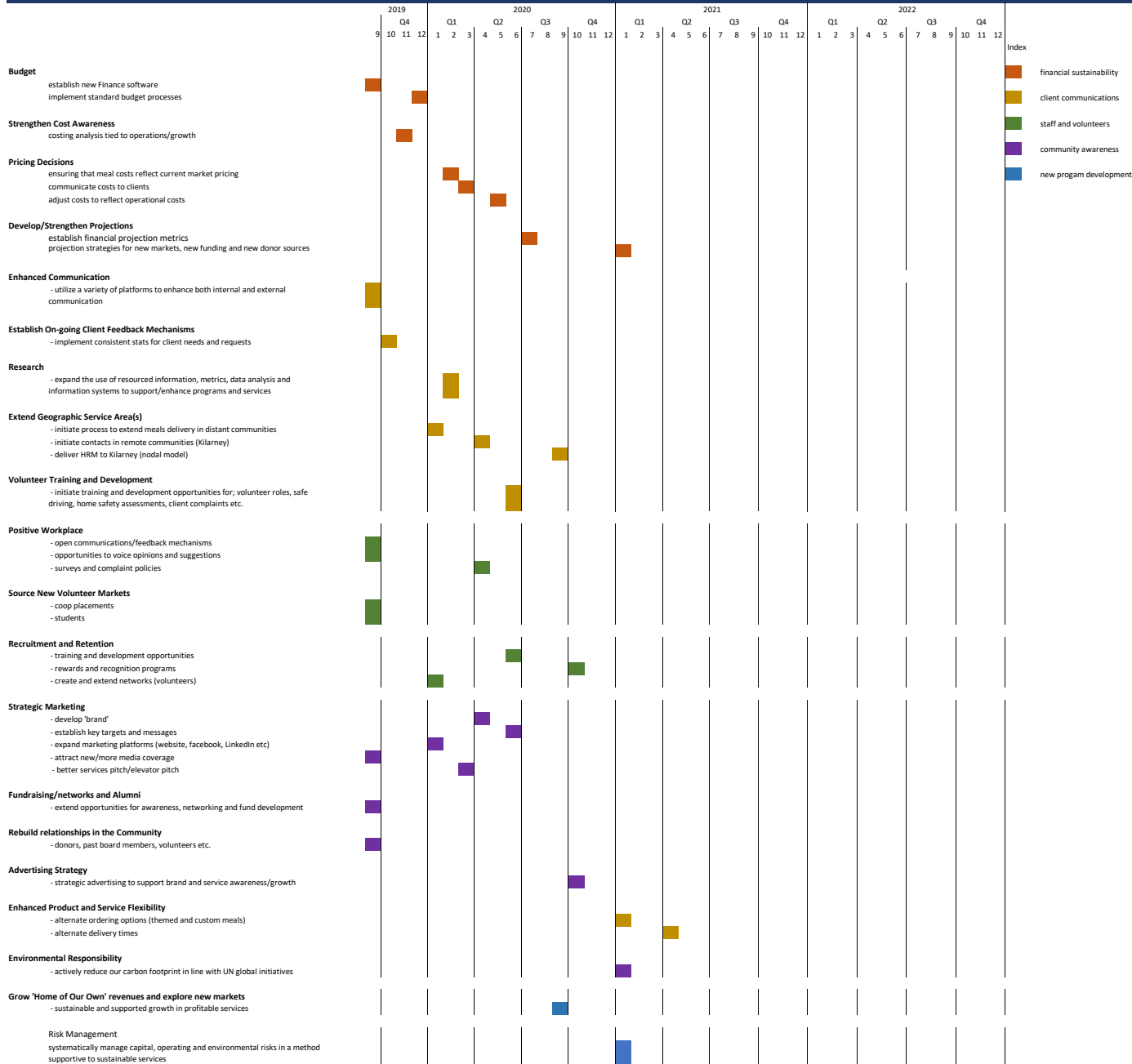
#### ***Source New Volunteer Markets***

- coop placements
- students

## Prioritized (Force-ranked) Implementation Plan

<u>Rank</u>	<u>Priority</u>	<u>Strategy(ies)</u>
1	<b><i>Financial Sustainability</i></b>	Strengthen Cost Awareness Establish Budget Processes Pricing Decisions Risk Management Develop/Strengthen Projections
2	<b><i>Client Services</i></b>	Enhanced Product and Service Flexibility Enhanced Communication Research Extend Geographic Service Areas Grow Home of our Own revenues and explore new markets
3	<b><i>Staff and Volunteers</i></b>	Positive Workplace Recruitment and Retention Rebuild Relationships in the Community, New Volunteer Services, New Volunteer Markets
4	<b><i>Community Awareness</i></b>	Strategic Marketing Rebuild Relationships in the Community Fundraising, Networks and Alumni Advertising Environmental Responsibility





# Meals on Wheels - Strategy Execution

Exhibit 11

Select a period to highlight at right. A legend describing the charting follows.

Period Highlight: 1

Plan Duration Actual Start % Complete Actual (beyond plan) % Complete (beyond plan)

