

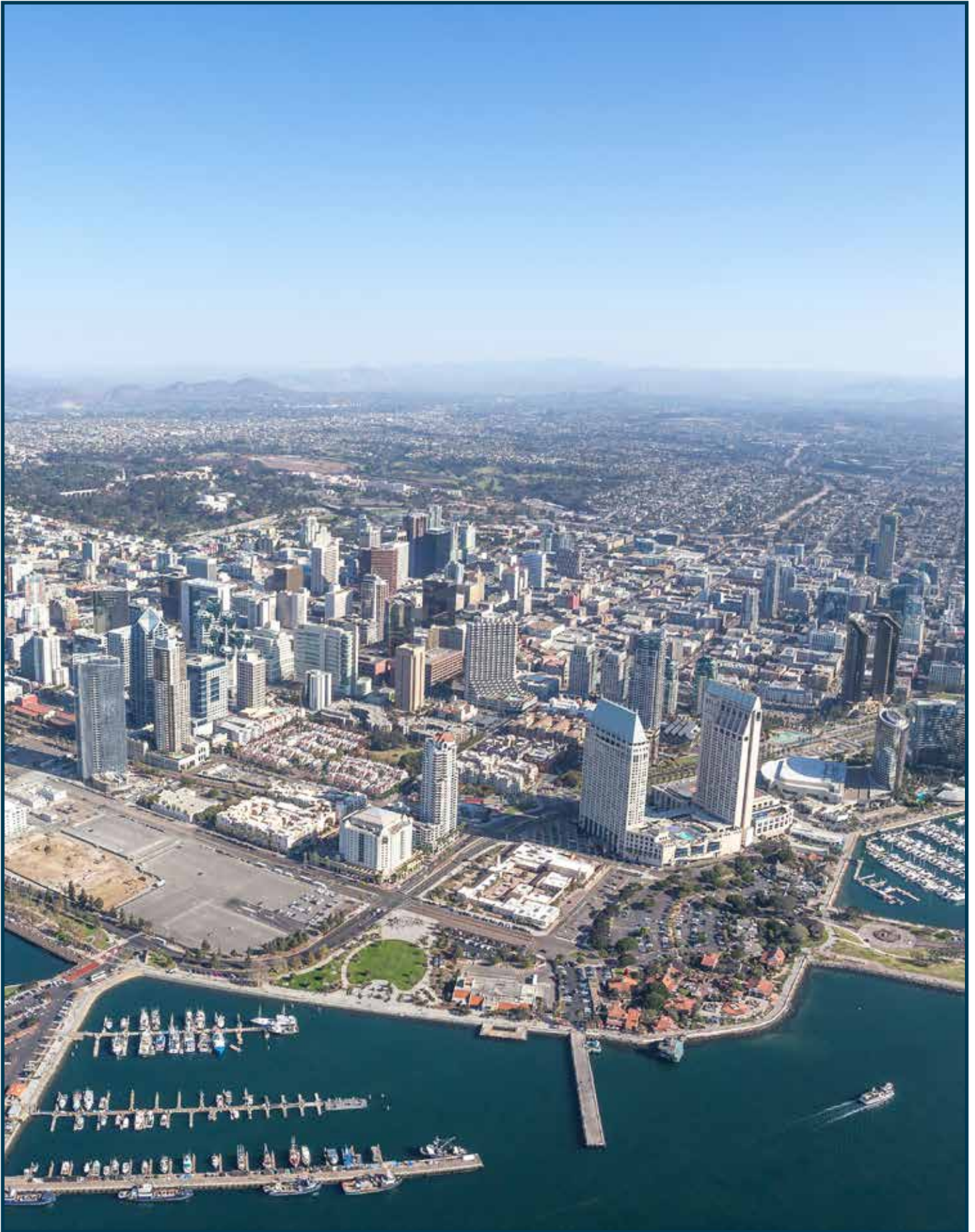


MEALS **on** WHEELS

SAN DIEGO COUNTY

2021-2023 STRATEGIC PLAN







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01 | INTRODUCTION

Meals on Wheels San Diego County (MOWSDC) is a 501(c)(3) nonprofit supported by dedicated leaders, board members, staff, volunteers, donors, and partners across our region.

Each year, MOWSDC delivers over 650,000 nutritious meals with friendly visits to older San Diegans, helping them stay in their homes, where they want to be. As members in good standing with Meals on Wheels America (MOWA) and Meals on Wheels California (MOWCA), our organization advocates for issues that impact the health, wellness, and independence of San Diegans who are 60 or older, their pets, veterans with disabilities of any age, and their caregivers.

MOWSDC provides much more than a meal.

Every day, we deliver nutritious meals to combat food insecurity and to positively impact health and wellness. We also offer moments of human connection by providing daily wellness checks, making weekly companionship calls, and focusing much needed attention on the social determinants of health.

Since the beginning of the COVID-19 pandemic in 2020, the demand for meals from MOWSDC clients has increased by more than 40% across the county. Fortunately, MOWSDC has been able to meet this historical demand thanks to the planning and execution of our hardworking staff, volunteers, and board members, as well as the remarkable generosity of the San Diego community.

Today, under the leadership of management and its Board of Trustees, MOWSDC is embarking upon what promises to be a transformative time of growth for the organization as we prepare for an ever-changing future.

A New Strategic Plan

To meet the growing needs of San Diego seniors, MOWSDC has invested impact-specific donations toward the development of its next three-year plan. Now completed, this strategic document will serve as a North Star to determine the direction for the organization, and to provide action items for management, staff, and volunteers countywide.

This strategic plan addresses a three-year term beginning Q3 2021 through the end of (calendar year) CY2023.

Over the last year, there have been exciting changes happening at MOWSDC: Brent Wakefield has accepted the role of President and CEO, major donations were made that validate our role, and the pandemic has highly accelerated an increase in meal demand and delivery. These are all positive indicators of growth, and demand requirements for clarity and leadership alignment.

There is change in our world: Big things are happening around us.

We're seeing substantial changes in safety and health issues related to the worldwide pandemic, as well as the community perception of our value. This poses potential changes in our funding environment due to the economic impact, and it sparks essential discussions around inclusion and diversity.

We are a financially sound nonprofit: We are well-poised to plan for what comes next.

We've invested time to reassess both our organizational priorities and our plan of attack, given the new normal. Our strong financial position enables us to be creative and innovative in our mission, while preserving the ethos of who we have always been.

MOWSDC needs to have a strong sense of direction: A true North Star.

The organization has gone through significant change over the last year and has been presented with new opportunities to provide more services to more people. It is important to Leadership and the Board that a clear path is created so our mission remains top priority, and our direction is clear without missing out on opportunities to do more for our clients.



Brent Wakefield

Brent Wakefield, CEO
Meals on Wheels San Diego County



Antoinette Middleton

Antoinette Middleton, Board Chair
Meals on Wheels San Diego County



02 | MISSION

As part of Meals on Wheels America, we affirm their mission to make change:

To empower local community programs to improve the health and quality of life of the seniors they serve so that no one is left hungry or isolated.

Within San Diego County, we further define our mission to our own community.

Our mission is to empower seniors and veterans to remain independent by nourishing their bodies, minds, and spirits.





03 | VISION

Meals on Wheels America shares their vision with all members.

An America in which all seniors live nourished lives with independence and dignity.

To do our part in achieving this as a member in good standing, we support their vision as part of our vision for our community.

Our vision is to drive out senior hunger and isolation across our region.





04 | VALUES

Meals on Wheels San Diego County, and the work we do, is built upon the pillars of our values.

The leadership, Board, staff, and volunteers of MOWSDC share passions for supporting seniors and veterans with disabilities. They are the drivers, both literally and figuratively, that deliver what we believe is needed most.

The DRIVERS in Our Community



Diversity,
in our people and ideas.



Respect,
in how we treat each other.



Integrity,
in our actions, words,
and engagements.



Vision,
in our collaboration,
innovation, and courage.



Empathy,
in the human connections we
make every day.



Resilience,
in our commitment to
serve others when called.





05 | GOALS

Meals on Wheels San Diego County has reflected on its past, in a thorough and objective manner, as it defines its direction for the future. During our collaboration, we purposefully identified the biggest problems throughout our organization that impede our ability to meet our goals, from various perspectives.

With our mission and vision in mind, we have established these goals for People, Innovation and Resources to impact our success.



PEOPLE

Our overarching goal for People is reach more, do more. Specifically, we will address:

Goal 1.0 | Reach More Seniors: Develop and implement a strategy to reach seniors in the underserved San Diego County communities to build awareness, create engagement, and deliver services.

Goal 2.0 | Grow MOWSDC: Identify and address the opportunities to expand our leadership capabilities throughout our region.

Goal 3.0 | Engage More Seniors: Increase and enhance interaction time and levels of engagement between clients and MOWSDC volunteers.



INNOVATION

Our overarching goal for Innovation is to “create our future.” Specifically, we will address:

Goal 4.0 | Innovate Our Menu: Ideate new items and prototype choice options for testing and implementation.

Goal 5.0 | Re-engage Healthcare Integration: Become a contracted entity with health plans and healthcare providers for senior clients under their care.

Goal 6.0 | Increase Our Services: Evaluate the potential to formalize a program partnership with other nonprofit(s) to expand our services to senior clients.

Goal 7.0 | Evaluate a Senior Care Innovation Hub: Elevate the priority for innovation within our region around senior healthcare issues by facilitating the collaboration between healthcare providers, agencies, and seniors.

Goal 8.0 | Improve the Volunteer Experience: Leverage technology to learn more, respond faster, and improve communication.

Goal 9.0 | Define More Than A Meal: Enhance our brand perception in the marketplace by communicating how we deliver “more than a meal” to the senior population.

Goal 10.0 | Create a Green Initiative: Measure, mitigate, and manage our own carbon footprint to improve the future health and wellness of San Diego seniors.

Goal 11.0 | Activate Our Advocates: Facilitate senior advocacy and civic engagement to identify issues, empower passionate people, and convene action throughout our region.



RESOURCES

Our overarching goal for Resources is “strengthen our foundation.” Specifically, we will address:

Goal 12.0 | Make Strategic Property Investments: Design a multi-phase approach to advancing the capacity and capabilities of our facilities across the region.

Goal 13.0 | Design Major Gifts and Planned Giving Programs: Create opportunities to support MOWSDC goals that will attract donors and family planned gifts.

Goal 14.0 | Secure Government Contracts: Diversify our revenue streams by securing more government contracts.

Goal 15.0 | Improve Our Infrastructure: Improve systems and process, upgrade technology, and empower human resources to increase efficiencies through a system-wide infrastructure improvement.

These well-defined goals give direction to our efforts by setting priorities, facilitating achievement, and increasing our conviction to succeed. The resulting deliverables will support sound decision making for leadership and motivate us all to reach our full potential.



06 | OBJECTIVES

Through an active listening exercise, we engaged leadership, board members, management, staff, and volunteers to share the problems they saw from their experiences. The results of this listening, and the dialog amongst leadership and board members, has produced a series of objectives that have been deemed actionable by MOWSDC's leadership and Board of Trustees.

Objectives measure our progress and offer confidence to strategy as well as a sense of achievement to those in the trenches. Each helps people make difficult decisions based on understanding and expectations. Our managers use objectives to set targets, motivate team members, and direct work toward a common goal. While the goals have more permanence, the objectives change and evolve during the lifetime of this strategic plan.



PEOPLE

1.0 | Reach More Seniors: Develop and implement a strategy to reach seniors in the underserved San Diego County communities to build awareness, create engagement, and deliver services.

Objective 1.1: Collaborate with San Diego County's Aging and Independent Services and other organizations, such as the Hunger Coalition and 211, to develop a map of the hidden hungry by zip codes.

- WHO: CEO, COO, Senior Projects Director, Services Committee
- WHEN: October 1, 2021 – December 31, 2021
- KPI: Digital map that utilizes data visualization and search criteria to reveal the underserved communities and seniors in need

Objective 1.2: Update and execute an internal readiness assessment to determine how to best serve areas in need, as their criteria changes over time.

- WHO: Exec. Team, Meal Center Manager, Volunteer Manager, Service Center Managers, Services Committee
- WHEN: January 1, 2022 – December 31, 2022
- KPI: A formal review of the data and its insights no later than January 31, 2022 in order to create new routes and increase intake and delivery

Objective 1.3: Design an outreach plan that increases the awareness of Meals on Wheels in order to create engagement with referrals, influencers, and decision makers within underserved communities.

- WHO: CEO, CEO, Sr. Projects Director, Services Committee, Marketing & Resource Development Committee
- WHEN: December 1, 2021 – December 31, 2022
- KPI: Annual plan to show how we will communicate, performance metrics of each effort, and outcomes

Objective 1.4: Identify and initiate services to new clients to better align with percentages of ethnicities in San Diego County.

- WHO: COO, Meal Center Manager, Service Center Managers
- WHEN: February 1, 2022 – December 31, 2022
- KPI: Monthly report accounting for the number of new clients on established and new routes, comparative demographics (MOM, YOY)

Objective 1.5: Design a sliding-scale fee structure for low-income senior clients that clearly communicates income eligibility requirements to clients, Seniors Service Centers, Partners, and Community-Based Organizations.

- WHO: CEO, COO, CFO
- WHEN: January 1, 2022 – June 30, 2022
- KPI: Number of new low-income applicants that utilize the sliding scale fee structure

2.0 | Grow MOWSDC: Identify the greatest opportunities to expand our leadership capabilities throughout the San Diego region.

Objective 2.1: Identify and secure qualified Human Resource candidates to design an employment lifecycle program for the organization to impact recruitment, advancement, and retention programs.

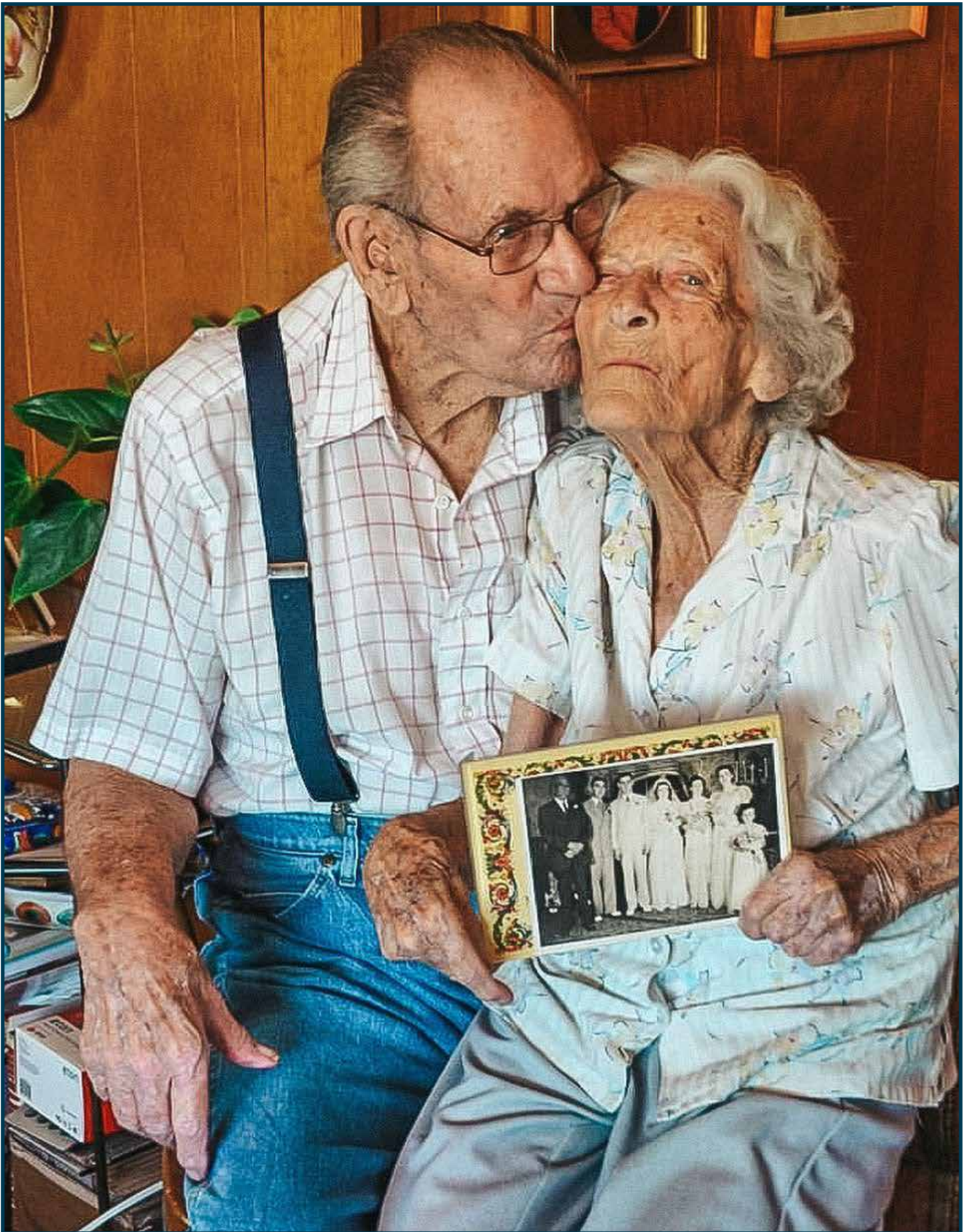
- WHO: CEO
- WHEN: June 1, 2021 – September 30, 2021
- KPI: The offer of a compelling compensation package, in step with our size and impact in the community, the acceptance of a uniquely qualified candidate for the position, and the recognition as one of the Best Places to Work by end of this strategic plan

Objective 2.2: Identify and secure qualified COO candidates that can impact the organization to enhance recruitment, advancement, and retention programs.

- WHO: CEO, Executive Committee
- WHEN: June 1, 2021 – December 31, 2021
- KPI: The offer of a compelling compensation package, in step with our size and impact in the community, and the acceptance of a uniquely qualified candidate for the position

Objective 2.3: Identify and secure new board members in areas of influence and expertise, such as geriatric care, nutrition and food industry, government grants, public service officials, and private and public sector executives with resources to donate.

- WHO: Board Chair, Development Committee and CEO
- WHEN: June 1, 2021 – Ongoing
- KPI: Current Board roster, demographics by industry and expertise, recommendations for category access, prospects profiles, offers presented, rate of acceptance, updated board roster



Objective 2.4: Design a MOWSDC Board Alumni engagement program providing structured events, alumni interaction and activities that inspire engagement and donations.

- WHO: Board Chair, Development Committee, alumni council members and CEO
- WHEN: June 1, 2021 – June 1, 2022
- KPI: Program overview, calendar of events, updated alumni roster, invitations vs rsvp vs attendance, alumni survey, detail of donations

3.0 | Engage More Seniors: Increase interaction time and enhance engagement with clients and volunteers.

Objective 3.1: Design and implement an outreach strategy to increase the number of volunteers in order to optimize routes, reduce route times, and minimize attrition.

- WHO: CEO, Senior Director of Projects, Volunteer Manager, Service Center Managers
- WHEN: October 1, 2021 – September 30, 2022
- KPI: Design of the plan, implementation of the plan, the number of applicants, number of new volunteers accepted, average route sizes, attrition rates, positive clients and volunteer satisfaction survey results (4 or greater rating on satisfaction scale)



INNOVATION

4.0 | Innovate Our Menu: Ideate new items and prototype choice options for testing and implementation.

Objective 4.1: Execute a weekly evaluation of items within the six-week cycle to iterate product improvements.

- WHO: Meal Center Manager, Dietician
- WHEN: June 1, 2021 – December 31, 2021
- KPI: Dates of review, number of items reviewed, change log

Objective 4.2: Iterate menus and packaging to better communicate and reposition MOWSDC as a “Delicious and Nutritious Meal” choice.

- WHO: CEO, Dietician, Meal Center Manager, Design Agency (Photography, Copywriting, Graphic Design, Production)
- WHEN: June 1, 2021 – September 30, 2021
- KPI: Website analytics, client survey results, anecdotal data from staff, volunteers, drivers

5.0 | Re-engage Healthcare Integration: Become a contracted entity with health plans and healthcare providers for senior clients under their care.

Objective 5.1: Develop a comprehensive client data collection plan to better understand applications, approvals, service requests, and outcomes that will attract attention of health plans and senior care professionals across the nation.

- WHO: CEO, COO, CFO, Senior Projects Director, Care Navigation Program Manager, Services Committee
- WHEN: January 1, 2022 – March 31, 2022
- KPI: Number of clients, applications submitted, applications approved, client engagement history, wellness scores

Objective 5.2: Secure funding for the design of a pilot program that collects data on MTMs (medically tailored meals) and wellness services to provide ongoing reporting and insights to clients, health plans, and health care providers.

- WHO: CEO, CEO, Grants Manager, Consultant, Meal Center Manager, Dietician
- WHEN: June 1, 2021 – March 31, 2022
- KPI: Grant application date, grant submission date, grant award date, program funding date, program design, program execution, program reporting

6.0 | Increase Our Services: Evaluate the potential to formalize program partnerships with other nonprofit(s) to expand our services to senior clients.

Objective 6.1: Launch a working committee that reviews the organization, based on data and analysis, in order to present recommendations on due diligence, process, and documentation.

- WHO: CEO, Board Chair, Ad Hoc Board Committee
- WHEN: June 30, 2021
- KPI: Committee formation date, launch date, scope of review, data collection, data analysis, reporting, insights, recommendations, board action date

Objective 6.2: Design a strategic partner plan that delineates process, projected scenarios, projected timelines, projected investments v returns, and includes formal recommendations from key perspectives.

- WHO: CEO, Ad Hoc Board Committee, Partner CEOs (org rep)
- WHEN: July 1, 2021 – December 31, 2021
- KPI: Plan outline, plan delivery date, content review, recommendations, board action

7.0 | Evaluate the Development of a Senior Care Innovation Hub: Elevate the priority for innovation within our region around senior healthcare issues by understanding the collaboration between healthcare providers, agencies, and seniors.

Objective 7.1: Develop an annual symposia that attracts leaders in senior health and wellness to address regional problems, share new ideas, and collaborate on best practices.

- WHO: CEO, Consultant, Ad Hoc Board Committee, Hospitals, FQHCs, Medicare, West Health, Legacy Foundation, San Diego County



IMPROVE OUR DELIVERY

Four small green sticky notes with handwritten notes.

BUILD A BETTER KITCHEN

Three sticky notes: one blue, one pink, and one white with handwritten notes.

CREATE [M]

Two sticky notes: one blue and one green with handwritten notes.

SERVE MORE + DIVERSE CLIENTS

Two sticky notes: one pink and one green with handwritten notes.

BUILD A BETTER APP

Seven sticky notes: one blue, one pink, one green, and three light green with handwritten notes.

EXPAND [SELL]

One blue sticky note with handwritten notes.

- WHEN: January 1, 2023 – September 30, 2023
- KPI: Agenda of events, speakers, presentations, workshop, training, consulting

8.0 | Improve the Volunteer Experience: Leverage technology to learn more, respond faster and improve communication.

Objective 8.1: Initiate the development of the next generation of ServTracker, based on the volunteer experience and user feedback, that employs best practices in senior support.

- WHO: Senior Projects Director, Volunteer Manager, Care Coordination Manager, Technology Consultant, Services Committee
- WHEN: July 1, 2021 – December 31, 2021
- KPI: Identified data sets and initial work with ServTracker (in progress)

9.0 | Promote More Than A Meal: Enhance our brand perception in the marketplace by communicating how we deliver “more than a meal” to the senior population.

Objective 9.1: Create a targeted marketing campaign for a PSA that underscores the fact that the meals open the doors to more human contact and wrap-around services.

- WHO: CEO, Marketing Committee, Resource Development Committee, Public Relations Firm
- WHEN: January 1, 2022 – March 31, 2022
- KPI: Current brand perception data (quantitative, qualitative), updated evaluation tool to reflect desired perceptions, tools for measurement, data sets, reporting

10.0 | Create a Green Initiative: Measure, mitigate, and manage our own carbon footprint to improve the future health and wellness of San Diego seniors.

Objective 10.1: Design a major gift / grant proposal to match current funding opportunities that demonstrates the cost-benefit analysis to upgrade all facilities to solar power.

- WHO: Executive Team, Meal Center Manager, Grants Manager, Solar Power Consultant
- WHEN: January 1, 2023 – June 30, 2023
- KPI: Detail of available grants, synopsis of grants, outline of proposal, versions of proposals, proposal activity, proposal feedback, award date, award amount, report, recommendations

Objective 10.2: Convene an internal committee to assess current departments and activities for creating a greener work environment.

- WHO: CFO, Internal Committee, Department Managers
- WHEN: October 1, 2021 – June 30, 2022
- KPI: Committee formation date, committee members list, organizational structure, review / recommendations by department, cost-benefit analysis, environmental impact report

Objective 10.3: Design a fleet-vehicle replacement strategy to convert 50% of vans to zero-emission electric vehicles, and develop the projected infrastructure to support adoption.

- WHO: COO, CFO, Meal Center Manager, Finance Committee
- WHEN: January 1, 2022 – December 31, 2022
- KPI: Total number of vehicles, cost-benefit analysis, projected investments

11.0 | Activate Our Advocates: Facilitate senior advocacy and civic engagement to identify issues, empower passionate people, and convene action throughout our region.

Objective 11.1: Design an annual program of structured community events, meetings, and activities.

- WHO: CEO, CEO, Director of Senior Advocacy (new position), Public Relations Firm, Marketing Committee, Resource Development Committee, Clients, Volunteers
- WHEN: September 1, 2021 – December 31, 2021
- KPI: Number of events, type of events, number invited, number RSVPs, number attendants

Objective 11.2: Design a program to support MOWSDC goals through staff and Committee engagement with Legislators on Sacramento Day.

- WHO: CEO, Director of Senior Advocacy, Civic Engagement Committee, Legislators
- WHEN: March 1, 2022 – May 31, 2022
- KPI: Number of staff (1), number of Committee members (3), number of goals supported, number of Legislators engaged, report on activities / insights / recommendations



RESOURCES

12.0 | Make Strategic Property Investments: Design a multi-phase approach to advancing the capacity and capabilities of our facilities across the region.

Objective 12.1: Secure expert commercial real estate consulting services to provide strategic insight on buy / build / rent / lease scenarios for each location.

- WHO: CEO, CFO, Finance Committee, Real Estate Consultant, Site Managers
- WHEN: July 1, 2021 – September 30, 2021
- KPI: Site review per location, analysis per location, scenarios per location, capital investment per location, recommendations, board presentation, board action (approval for implementation)

13.0 | Design Major Gifts and Planned Giving Programs: Create opportunities to support MOWSDC goals that will attract donors and family planned gifts.

Objective 13.1: Design programs that scale to provide donor circle benefits and naming opportunities that align with levels of generosity and impact.

- WHO: CEO, CEO, Marketing Committee, Resource Development Committee, Donors
- WHEN: July 1, 2021 – March 31, 2022
- KPI: Establish giving circles and naming opportunities to align with proposals

Objective 13.2: Create Moves Management program (identification, cultivation, solicitation, stewardship) and donor prospect assignment in our CRM.

- WHO: CEO, Database Manager
- WHEN: January 1, 2022 – March 31, 2022
- KPI: All donors at \$5,000 per year level will be assigned a prospect manager and will begin moving through the donor pipeline

14.0 | Secure Government Contracts: Diversify our revenue streams by securing more government contracts.

Objective 14.1: Target a \$1M annual contract with San Diego County AIS (Aging and Independent Services) through their competitive RFP cycle, or earlier, through lobbying efforts and exceptional considerations.

- WHO: CEO, CFO, Director of Senior Advocacy (new position), Grant Manager
- WHEN: June 1, 2021 – May 31, 2022
- KPI: Detail of prospects, contacts, current opportunities, schedules, and alerts; contract secured or project abandoned after discovery phase

Objective 14.2: Attract, identify, and secure a dedicated full-time employee (FTE) that can ensure federal policy is being followed throughout the grant process.

- WHO: CEO, Human Resources Manager
- WHEN: Based on Contract Dates
- KPI: The offer of a compelling compensation package, in step with our size and impact in the community, and the acceptance of a uniquely qualified candidate for the position, and the delivery of a clearly documented process for contract compliance

15.0 | Improve Our Infrastructure: Improve systems and process, upgrade technology, and empower human resources to increase efficiencies through a system-wide infrastructure improvement.

Objective 15.1: Upgrade AR (Accounts Receivables) and AP (Accounts Payable) systems for web-based commerce.

- WHO: CFO, Database Manager, Accounting Staff
- WHEN: (Fiscal Year) FY2021 – 2022
- KPI: Detail of current process(es), detail of proposed process(es) with database integration, cost-benefit analysis

Objective 15.2: Improve website to increase visual impact, improve access to information, and communicate current goals and objectives.

- WHO: CEO, Web Designer, Graphic Designer
- WHEN: June 1, 2021 – December 31, 2021
- KPI: Google Analytics (historical) vs current (overall), including visitors, bounce rate, total time on site, pages visited





07 | SWOT ANALYSIS & STRATEGY

A SWOT analysis provides a foundation and context for developing strategy by examining the strengths and weaknesses within an organization, as well as external opportunities and threats, for the purpose of strategizing. This structured analysis helps identify the relationships between internal and external factors and exposes strategies for addressing different elements.

STRENGTHS

- Brand Recognition / Media Awareness
- Board and Leadership
- Army of Volunteers
- Responsive to Community Needs
- Fiscally Sound and Sustainable
- Innovative Mindset

WEAKNESS

- Recruitment / Retention of Staff, Volunteers
- Sustainable Growth
- Dependent on Volunteers
- Limited Programs
- Tech infrastructure
- Food Not Perceived as "Good"
- Perception of Typical Client

OPPORTUNITIES

- 580,000* Who Need Our Help
- Nonprofit Partnerships
- Healthcare Integration
- Donors - Project-based Fundraising
- Social Enterprise
- Alternate Funding: Gov, Grants

THREATS

- Not Making Change / Meeting Expectation
- Menu Not as In Demand as Trends
- Compete with Other Options
- As Markets Age, Personal Choice is Expected
- Silver Tsunami / Can't Keep Up with Demand

Meals on Wheels San Diego County is well established within the community, yet needs to remain self-aware of our role and responsibilities within our region. To that end, our leadership and Board see our organization in this way:

Strengths

The Meals on Wheels brand is well known in our community and we are fortunate to receive frequent media coverage. Our Board and Leadership are strong in spirit and are in sync. We are fortunate to be supported by an army of volunteers which enables us to be responsive to community needs. Our organization is fiscally sound and our services are sustainable, enabling us to deploy an innovative mindset.

Weaknesses

We are challenged with the ongoing recruitment and retention of staff and volunteers. This makes it difficult to maintain sustainable growth. Our dependency on volunteers to deliver services is one of the obstacles that limit our programs. We currently lack the technology infrastructure that is standard within an enterprise of our size. Although our services are perceived as excellent by clients, our food is not perceived as “good” and we’re often seen as a last resort which impacts the perception of our typical client – and that’s just not the reality of who we serve.

Opportunities

We are flush with opportunities; There are 580,000* people in San Diego who meet our criteria and need our help. Numerous nonprofits provide opportunities for strategic partnerships, and numerous health care plans provide opportunities for integration.

Donors are telling us they are interested in project-based fundraising, and we’ve identified opportunities for Social enterprise: producing products that generate revenue to fund more services and bolster the perception of our food by our community. We’ve also identified new opportunities with alternate funding from the government and grants specific to the people we already serve.

Threats

Our greatest threat is not making the change our impact donors expected when they so generously invested in our organization. We are vulnerable in the marketplace because our menu is not as in-demand as other food trends and options. As our markets age, our future clients will have become accustomed to personal choice, and we’ll need to respond in order to stay relevant. The spike we’ll see in our aging population – often referred to as the “Silver Tsunami” – will produce more seniors who need us, and we may not be able to keep up with demand.

Strengths and Opportunities

When we examine the combinations of our Strengths and Opportunities, we identify attributes of our organization that provide distinct advantages in the marketplace.

- Our brand awareness and frequency in the media will support our goal to reach those 580,000* who need our help.
- Our Board, Leadership, and army of Volunteers make us an attractive candidate for partnering with other nonprofits who share our goals.
- Our responsiveness to community needs demonstrates how well-prepared we are for healthcare integration.
- Our fiscal strength and sustainability demonstrates to government funders that we're a safe bet to invest with to support their goals.
- Our resolve to strengthen our infrastructure is done so with a sense of responsibility for our impact on the environment.
- Our innovative mindset is attractive to the donors who want to get behind a big idea.



In order to leverage these advantages, we will need to move forward with our work as planned in these goals:

- People Goal 1.0 | Reach more Seniors
- People Goal 2.0 | Grow MOWSDC
- People Goal 3.0 | Engage more with Seniors

- Innovation Goal 5.0 | Integrate with Healthcare
- Innovation Goal 6.0 | Increase our Services
- Innovation Goal 7.0 | Establish a Senior Care Innovation Hub
- Innovation Goal 10.0 | Create a Green Initiative

- Resources Goal 13.0 | Design Major Gifts and Planned Giving Programs
- Resources Goal 14.0 | Secure Government Contracts
- Resources Goal 15.0 | Improve our Infrastructure

Weaknesses and Threats

When we examine the combinations of our Weaknesses and Threats, we identify attributes of our organization that provide distinct disadvantages in the marketplace.

- The challenge with recruitment and retention of staff and volunteers could impact our ability to make the change major donors have expected.
- Our challenge to sustain growth is compounded by our sole dependency on volunteers to deliver our meals — meals that already are not as in-demand as other trending options.
- Our limited programs cannot compete with other options some seniors already have available to them.
- The perception of our food as sub-par will not compete with the personal choice product our soon-to-be clients have come to expect. This could further damage our perception in the marketplace making it even harder to grow our client base.
- This would only further the misperception that our typical client is destitute making it even harder to serve the coming spike in senior population.



In order to mitigate these disadvantages, it is critical that we move forward with our work as planned in these goals:

- Innovation Goal 4.0 | Innovate our Menu
- Innovation Goal 8.0 | Improve the Volunteer Experience
- Innovation Goal 9.0 | Define More Than A Meal
- Innovation Goal 11.0 | Activate our Advocates

- Resources Goal 12.0 | Make Strategic Property Investments



08 | EVALUATION

It is the responsibility of MOWSDC leadership to work on each objective to ensure the team has completed the work assigned. They will be responsible for evaluating the work objectively and will report with full transparency what has been achieved.

All of our progress will be evaluated through their process and upon presentation to ensure the solutions they provide will be moving us closer to our goals, not farther away.

- Goals define the scope of work, maintaining focus for everyone involved
- Objectives detail each of the required actions
- Project plans identify the dates and responsibilities
- The design thinking process directs each group's action with go/no-go requirements to move to the next step
- When ideas have been prototyped and tested, a formal presentation will share solutions, and each perspective in the audience can contribute to its evaluation
- Upon successful evaluation, Leadership can confidently implement the solution to gain real world feedback

Upon the completion of all objectives, our Leadership will evaluate our progress towards achieving our goals and report our success to the Board, and community at large.

We can manage what we measure.

Each of our objectives have been scheduled to be started, completed and implemented over the next 30 months. Upon the completion of each objectives, our leadership will evaluate our progress towards achieving our goals and report our success to the Board, and community at large.

People: Reach More, Do More.

1.1: Collaborate with San Diego County's Aging and Independent Services and organizations, like the Hunger Coalition and 211, to develop a map of the hidden hungry by zip codes.

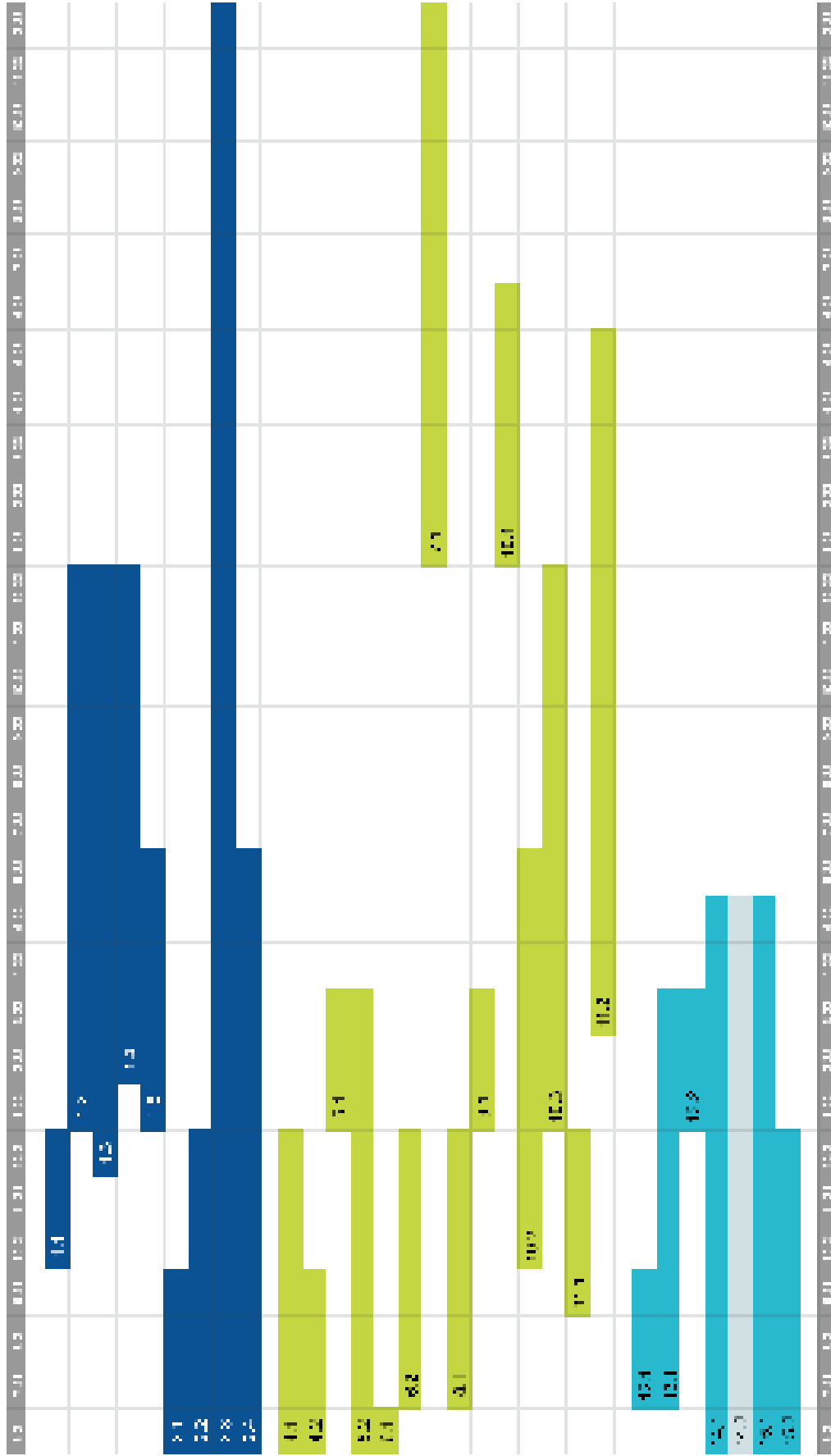
1.2: Update and execute an internal readiness assessment to determine how to best serve "hot" areas, when their criteria changes over time.

1.3: Design an outreach plan that increases the awareness of Meals on Wheels in order to create engagement with referrals, influencers, and decision makers within underserved communities.

1.4: Identify / initiate services to new clients to better align with % of ethnicities in San Diego County.

1.5: Design a sliding scale fee structure for low-income senior clients that clearly communicates income

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eligibility requirements to clients, Seniors Service Centers, Partners, and Community-Based Organizations.

2.1: Attract, identify, and secure qualified Human Resource candidates to design an employment lifecycle program for the organization, by role, to impact recruitment, advancement, and retention programs.

2.2: Attract, identify, and secure qualified COO candidates that can impact the organization, by role, to impact recruitment, advancement, and retention programs.

2.3: Identify and secure new board members in areas of influence and expertise, such as geriatric care, nutrition and food industry, government grants, public service officials, and private and public sector executives with resources to donate.

2.4: Design a MOWSDC Board Alumni engagement program providing structured events, alumni interaction and activities that inspire engagement and donations.

Innovation: Create the Future.

4.1: Execute a weekly evaluation of menu items within the six-week cycle to iterate product improvements.

4.2: Iterate menus and packaging to better communicate and reposition MOWSDC as a “Delicious and Nutritious Meal” choice.

5.1: Develop a comprehensive client data collection plan to better understand applications, approvals, service requests and outcomes that will attract attention of health plans and senior care professionals across the nation.

5.2: Secure funding for the design of a pilot program that collects data on MTMs (medically tailored meals) and wellness services to provide ongoing reporting and insights to clients, health plans, and health care providers.

6.1: Launch a working committee that reviews the organization, based on data and analysis, in order to present recommendations on due diligence, process, and documentation.

6.2: Design a strategic partner plan that delineates process, projected scenarios, projected timelines, projected investments v returns, and includes formal recommendations from key perspectives.

7.1: Develop an annual symposia that attracts leaders in senior health and wellness to address regional problems, share new ideas, and collaborate on best practices.

8.1: Initiate the development of the next generation of ServTracker, based on the volunteer experience and user feedback, employing best practices in senior support.

9.1: Create targeted marketing campaign in a PSA that underscores the fact that the meals open the doors to more human contact and wrap-around services.

10.1: Design a major gift / grant proposal to match current funding opportunities that demonstrates the cost-benefit analysis to upgrade all facilities to solar power.

10.2: Convene an internal committee to assess current departments and activities for creating a greener work environment.

10.3: Design a fleet vehicle replacement strategy to convert 50% of vans to zero-emission electric vehicles, and the projected infrastructure to support adoption.

11.1: Design an annual program of structured community events, meetings, and activities.

11.2: Design a program to support MOWSDC goals through Staff and Committee engagement with Legislators on Sacramento Day.

Resources: Strengthen our Foundation.

12.1: Secure expert commercial real estate consulting services to provide strategic insight on buy / build / rent / lease scenarios for each location.

13.1: Design programs that scale to provide donor circle benefits and naming opportunities that align with levels of generosity and impact.

13.2: Create Moves Management program (identification, cultivation, solicitation, stewardship) and donor prospect assignment in our CRM.

14.1: Target a \$1M annual contract with San Diego County AIS (Aging and Independent Services) through their competitive RFP cycle, or earlier, through lobbying efforts and exceptional considerations.

14.2: Attract, identify, and secure a dedicated full-time employee (FTE) that can ensure federal policy is being followed throughout the grant process

15.1: Upgrade AR (Accounts Receivables) and AP (Accounts Payable) systems for web-based commerce.

15.2: Improve website to increase visual impact, improve access to information, and communicate current goals and objectives.





This strategic plan is the result of planning, meetings, activities, exercises, and surveys that provided data and insights to fuel discussions throughout our organization.

To learn more about our methodology, activities and the resulting data, access these resources:

- [MOW Scope of Work](#)
- [MOW Strategic Project Plan](#)
- [MOW Strategic Plan - PPT](#)

Tools

- [What's Your Problem? Campaign Brief](#)
- [What's Your Problem? Campaign 1](#)
- [What's Your Problem? Campaign 2](#)
- [What Do We Need To Know? Video](#)
- [What Do We Need To Know? Whiteboard](#)
- [Workshop Presents Video](#)
- [Mission+Vision Workshop Transcript](#)
- [Mission+Vision Workshop Video](#)

Research and Results

- [Problem Statements & Responsibilities](#)
- [What Do We Need To Know? Data Set](#)

Presentation

- [MOW SDC Rotary Club PPT](#)
- [MOW Board Intro 1](#)
- [MOW Board Update 2](#)

References

- [MOW Key Messages 12-3-20](#)
- [MOW 2019-2020 Annual Report](#)
- [MOW 2015-2020 Strategic Plan \(PPT\)](#)

Media

- [KUSI - MOW Looking for Volunteer](#)



MEALS **on** WHEELS

SAN DIEGO COUNTY

<http://meals-on-wheels.org>