

Meals on Wheels Fredericton Inc

Strategic Planning

2024-2029

Presented by:

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Introduction

Meals on Wheels as a community movement has been an essential part of the Canadian social net since its introduction to our country in 1963 (in Branford, Ontario). Four years later, in 1967, the Fredericton iteration of this movement came into existence as a volunteer-led and run project. From its inception, the needs for the services and the vast community benefits of such an initiative became obvious very quickly. This growing recognition and expanding demand for such an organization in our community led to the incorporation of the project into a registered charity and Meals on Wheels of Fredericton inc. was officially incorporated in 1979.

The process of crafting the five-year Strategic Plan for a well established and essential organization to our region is a task that carries specific challenges. Consideration of the rich history and long traditions of the organization must balance the actions undertaken to address the needs and challenges of the present. This balance necessary to ensure that the core mission of the organization is preserved in an ever-changing community, is one that this Strategic Plan strives to maintain.

In the following pages, all efforts were made to respect this equilibrium while assembling a vision and tracing the path forward for the years from 2024-2029. The consultation process, from which these emerged, was both enlightening and energizing though a deeper understanding of an organization that, while part of a wide network of similarly named initiatives, is unique and, in many ways, exceptional.

Process and sources

As stated in the introduction of this document, one of the primary objectives in the crafting of this strategic plan is that it would be custom made to fit the organization's specific needs. To ensure that this goal can be reached, the process of assembling this vision was centered on information and sources that are at the core of MOW's specific realities. Listed below are the methods and sources of input that were central to the process of preparing the 2024-2029 strategic plan.

Administrative and financial documents

The documentation provided by the organization's leadership was extensive, varied and quite helpful in understanding the overall situation of MOW. It provided good insight into the organization's history and evolution, as well as a clear picture of the current state of things. The following list of documents is an example of the sources used which were particularly helpful in the process.

- Organization's Bylaws
- Financial Statements (from 2017-2018 to 2020-2021)
- AGM Annual Reports
- Excerpts from grant applications (particularly helpful in the Organization status and history)

Initial discussions with stakeholders

At the outset of the process, a few more informal discussions were held with several of the organization's stakeholders. The main goal of these of these discussions was to help shape the process of crafting the strategic plan, by bringing out the right elements of focus and the questions most susceptible of capturing the essential information. Mainly the stakeholders that contributed to this part of the process were some Board members (Past President, President and Treasurer) and some staff (Executive Director and some administrative staff).

Analysis by Chef Pat Mills

Another significant source of guidance in elaborating the process and scope of the 2024-2029 strategic plan is the analysis of the operations by Chef Pat Mills. During this process, he was able to spend a few days on site with the staff. Prior to this visit, Chef Pat already had an in-depth knowledge of MOW, having helped when the organization established their own kitchen operations. Because of his extensive experience and his prior knowledge of MOW, his insight was quite helpful in getting a clearer picture of the organization's operations.

Board of Directors Strategic Planning Session

The above-mentioned steps of the process were instrumental in preparing the Board of Directors Strategic Planning Session held in early October. The purpose of this session was to outline and detail the strategic pillars and corresponding objectives for the period covered by this strategic plan. The planning session was quite successful in bringing shape and clarity to the process. It is worth noting that the participation of the administrative staff to this session was very helpful and contributed significantly to the results.

Staff Operational Planning Session

Following the Board of Directors Strategic Planning Session, two different sessions with staff were held to help draw out the specific activities best suited to attain the plan's objectives.

Personal knowledge of the organization

A more informal and admittedly subjective source that helped with the process of crafting the present document is my own personal knowledge of MOW. It has been my privilege to know and collaborate with the organization in different contexts over the years. Although often at a distance, this contact with MOW over the years has given me a sense of the organization. This has undoubtedly had an impact on the Strategic Plan which, I hope, was beneficial.

Accompaniment on a delivery route

One last item on the list of process and sources that helped nourish the crafting of this strategic plan needs to be mentioned. Having the opportunity to accompany someone on their delivery route was quite an insightful experience. It assisted in gleaning a better understanding of the daily reality and the mechanics of the organization's operations. More importantly though, it provided a better comprehension of the substantial community impact of MOW, and it provided a glimpse of its significance to both its clients and volunteers.

Over-arching principles

The process of gathering the information and content for this document was quite enlightening, particularly regarding the aspects and the essence which make MOW such a unique organization. These qualities and characteristics are at the core of exactly what is this community-based group, and the foundation upon which it has built its success over the years. Illustrating and preserving these essential qualities have become over-arching principles within the organization's Strategic Plan for 2024-2029. It is important to keep them in mind when reading through this document. Topmost amongst these principles are the following:

Focused on Human Resources

The essence and the success of MOW comes in great part from the human resources that make it work on a day-to-day basis. It is important to note here that this definition fully includes the numerous volunteers who generously offer their time, efforts and engagement, as well as the dedicated staff employed by the organization. The strategic pillars, the objectives and the activities presented in this document have been elaborated with a mind to reflect this reality. The strategic plan should therefore be read with this in mind.

Protection and Preservation of the Core Mission

Throughout the consultation process of creating the 2024-2029 Strategic Plan, the importance of protecting and preserving MOW's core mission has been made clear on numerous occasions. In the light of the organization's growth, widening operations and current challenges, it is especially important to state this as a guiding principle. Adhering to this principle in the implementation of the Strategic Plan is not only essential, but will also be a main determinant of its continued success.

Specificity of Meals on Wheels of Fredericton Inc

Although it is part of a large network of groups bearing the same name, MOW is a distinct and, in many ways, quite unique organization. The process of understanding its operations, its realities, its challenges, and its essence must be with this in forefront of mind. All efforts have been made to reflect this principle in the process of preparing the Strategic Plan. The same principle is just as important to consider in its reading and implementation.

Organization status and history

As an organization, Meals on Wheels of Fredericton Inc. (MOW) has seen considerable growth and evolution since its inception in 1967. Even more so during the last ten years, MOW has seen phenomenal growth in its community impact and fundamental changes in its operations. Although they do not paint the complete picture, the number of meals delivered annually help to better illustrate the size and scope of this organizational development. In 2013, the organization delivered roughly 30,000 meals, all purchased from outside sources. These sources were the Dr. Everett Chalmers Hospital (DECH) on the south side of our city and by York Care Center (YCC) on the north side. In 2023, MOW delivered more than 95,000 meals with the vast majority (80%) being prepared internally by the organization.

These changes in the scope and the operations came primarily in response to a rapid growth in the demand for MOW's services. A variety of factors contributed to the substantial increase in demand, chief amongst them being the changing demographics of the city, an increased desire to "age in place" and the growing recognition of the community's role, responsibility and ability to meet these growing needs.

This substantial growth, in a relatively short amount of time, brought with it several challenges for the organization. Chief amongst them was undoubtedly finding an adequate supply of meals. Until 2017, all of the meals were purchased from the outside sources (mentioned above) which were able to provide freshly prepared, nutritious meals in sufficient quantities to meet the organization's needs. The focus of MOW's operations was therefore mainly on the various facets of the delivery of the meals. When the daily numbers of meals neared 200, both suppliers advised MOW that they had reached maximum capacity in what they could supply.

In the process of looking for solutions to this, the possibility of MOW operating its own kitchen was considered at different times. There existed, at the time, examples of other Meals on Wheels organizations which have done so, although none in New Brunswick. The idea was set aside because of how large of an undertaking such an initiative appeared to be. The challenges of raising the capital required to equip a commercial kitchen, of securing a building and of developing the expertise necessary to operate such an enterprise seemed to be prohibitive at the time.

The organization's efforts were instead directed towards finding other partners to supply the meals needed to match the growing needs of the community. This proved more difficult than anticipated. The volume of meals needed, combined with the necessary dietary requirements and the financial realities of the program, were not a fit for the structure or the organizational capabilities of any of the institutions that were approached. In the fall of 2017, a promising partnership was developed with a company called Locavore, specializing in the processing of local foods. A positive and successful pilot project was set up between the two organizations, and both eventually agreed to develop the experiment into a more permanent arrangement. This promising initiative and partnership unfortunately came to an abrupt end, when Locavore made the decision to dissolve the company.

Locavore's decision to end its operations was a setback to MOW's search for a partner organization to supply the required meals. But the decision also provided an opportunity that brought back to the forefront the possibility of MOW operating its own kitchen. When they closed their doors, Locavore left behind a fully equipped and functional commercial kitchen. The company's owners agreed to sublease the space and equipment to MOW for a pilot program, in order to see if operating its own kitchen would be a viable alternative going forward.

The opportunity seemed both ideal and well timed because, by this time, MOW had reached the limit of meals per day available through its regular suppliers. The organization was faced with the impossible decision of turning clients away, unless and until it could find another source of meals. After careful consideration and extensive consultations, the Board of Directors made the decision to move forward with the pilot project and the organization began operating its own commercial kitchen.

The project began in January 2018 with the preparation of 12 meals per day which corresponded to one city route of delivery. By June of the same year, the pilot operation had progressed to preparing 60 meals a day. At this point, the organization made the decision to go ahead on a permanent basis and arranged to take over the lease for the kitchen facility and purchase the equipment it had been leasing. Operations were also consolidated by moving MOW's administrative offices to the same location as the kitchen.

The pilot project was a resounding success that has had a very large impact on the operations of the organization. Through the operations of its commercial kitchen, the organization has been able to keep up with the growing demand of the community for its services. As of the crafting of its 2024-2029 Strategic Plan, MOW now prepares over two hundred and fifty (250) meals per weekday and up to two hundred (200) meals on weekend days. Approximately twenty percent (20%) of the meals delivered by MOW are still being provided through the DECH. The organization's leadership thought it wise to maintain this relationship, as an alternative meal source in the event of unforeseen issues.

This recent history of MOW is clearly a story of success and of impressive community-based organization. However, it is important to state that it has not been accomplished without many significant challenges, many brought upon or amplified by the COVID-19 pandemic. It is also important to state that some of these challenges and questions remain and will have to be addressed or answered by the organization in the coming months and years.

One of the most significant of these challenges and questions stems from the maximum capacity, layout and condition of the facility that MOW currently rents and operates. The significant growth that the organization has seen in recent years has pushed its operations to, and even beyond, the maximum limit of the present space.

Strategic Plan Structure

The present strategic plan is organised in a straightforward and conventional structure. At the core of the plan are the objectives that the organization is setting for itself as the focus for the next five years. These objectives are organized in three different pillars which were identified, through the consultation process described above, as highest strategic priority for 2024-2029. The strategic pillars identified as the corner stones of this plan are the following:

Strategic Pillars

1. Operational capacity and efficiency
2. Organization viability and sustainability
3. Social/community impact

The strategic plan also outlines the specific activities that have been identified as the most efficient means to attain the set objectives. These are the concrete and measurable actions that will be considered to make the strategic pillars and their underlying objectives a reality.

Timeline

To better illustrate the flow of actions during the period covered by this strategic plan, a timeline of activities is offered. Activities are identified as being either short, medium or long term. In the context of this document, the type of activity is defined as follow:

| | |
|-------------|---|
| Short Term | Less than one year |
| Medium Term | 12 to 48 months |
| Long Term | More than 48 months / On a continuing basis |

These are guidelines and not at all absolute. There will conceivably be changes and adaptations of the timelines during implementation of the strategic plan. Ultimately, the final timing of the activities will be the yearly operational plans that will detail the implementation 2024-2029 Strategic Plan.

It is important to clarify here that the time measure for the activities offered here is determined by the estimated end date, and not the beginning of the action. Therefore, the beginning of a medium- or long-term activity can occur quickly or immediately.

Objectives and activity types

The activities outlined in the strategic plan are also presented through another filter, that of being either an operational or a project action. It is important to note that an activity, especially one that has wide ranging components, can have operational and project aspects. In this case both categories are indicated next to the activity with the type judged to be more substantial listed first. The definition used to determine the classification of the activity type is the following:

Operational activity:

- These are activities that are already tied into (or new activities that are meant to be tied into) the organization's regular ongoing operations.
- The costs associated to these activities are wholly dependent on the organization's operational budget

Project driven activity

- Project activities are actions have a distinct beginning and end and that will not become part of the organization's regular ongoing operations.
- These actions are dependent on special budgets funding allocated to the project either through outside grants and/or board of director decision.

Strategic Pillars

Strategic Pillar 1 – Operational capacity and efficiency

| Objective | Activity | Timeline | Activity Type |
|---|--|----------|----------------------|
| 1) Optimize operational efficiency | 1.1) Human resources review <ul style="list-style-type: none"> Review and update the Organizational chart. Review and update job descriptions for all positions. Update and expand HR policies. Review of pay scale, benefits and working conditions. | Short | Operational /Project |
| | 1.2) Increase Kitchen capacity and utilization <ul style="list-style-type: none"> Review and improve operational efficiency. Expand on MOW's Social Enterprise approach. Increase production through projects (Schools, frozen meals to other communities). Expand on kitchen hours of operation. | Short | Operational /Project |
| | 1.3) Improve Meal delivery <ul style="list-style-type: none"> Explore technological improvements to operations (for example route optimization apps). Software update. Systemic review of meal deliveries Consolidate volunteer coordination. | Short | Operational /Project |
| | 1.4) Optimize governance/operational parameters <ul style="list-style-type: none"> Governance refresher course specific to organization realities. | Medium | Project |

| Objective | Activity | Timeline | Activity Type |
|---|---|---------------------|----------------------|
| 2) Improve recruitment and retention | 2.1) Volunteer recruitment <ul style="list-style-type: none"> Review, update and improve implementation of current recruitment and retention strategy for volunteers. Increase collaborations with organizations serving volunteer target groups such as seniors, youth, community groups and businesses. (ex. Adopt a Route) Increase visibility of Meals on Wheels and of its impact on people and on the community. Improve contact with University of New Brunswick (UNB) and New Brunswick Community College (NBCC). | Short | Operational |
| | 2.2) Staff recruitment <ul style="list-style-type: none"> Develop and implement recruitment and retention strategy for growing staff needs. Insure sufficient staffing for growing needs of organization (volunteer coordinator). Expand on student-oriented recruitment (summer job, internship, red seal placement). Improve contact with UNB and NBCC. Explore Red seal certification for cooking staff. | Short | Operational |
| 3) Facility capacity | 3.1) Kitchen facility <ul style="list-style-type: none"> Appoint a Committee (Board and ED and/or delegated staff) to study owned facility vs expansion of current facility or renting other location. Contract feasibility study of owned facility vs expansion of current facility or renting other location. Analyse advantages and disadvantages of owned facility vs expansion of current facility. Formulate committee recommendations to Board on best path forward. Implement Board of directors' decision. | Short | Operational /Project |
| | 3.2) Facility improvements <ul style="list-style-type: none"> Implement necessary upgrades to facility and equipment. Depending on the results of 3.1 <ul style="list-style-type: none"> Identify and implement required facility and equipment upgrades (office space, washrooms, heat and windows etc.). | Short Medium | Operational |

Strategic Pillar 2 – Organization viability and sustainability

| Objective | Activity | Timeline | Activity Type |
|--|---|----------|----------------------|
| 1) Improve operational costs | 1.1) Operational costs review <ul style="list-style-type: none"> • In-depth analysis of operational deficit and identify possible means of addressing it. • Evaluate cost of meal production and identify savings without lowering food quality. • Evaluate organization's administrative costs. | Long | Operational /Project |
| | 2.1) Business development <ul style="list-style-type: none"> • Expanding role (Frozen meals, Meals to go, schools,). • Explore new opportunities for markets that connect to organization's core mandate (ex. seniors' residences and CÉ D'ICI). • Develop, promote and research funding for MOW's Social Enterprise approach (with Economic Social Inclusion Corporation). • Manage growth in order to keep up with demand for meals. • Wheels on Meals relaunch and growth. | Long | Operational /Project |
| 2) Diversify and expand revenue sources | 2.2) Fundraising and grant applications <ul style="list-style-type: none"> • Consolidate existing fundraising initiatives. • Review fundraising (grants, sponsors, bequeaths, estate planner etc.). • Create fundraising and project development coordinator position (possibly combined with Volunteer coordinator). | Short | Operational /Project |
| | 3.1) Staff Succession planning <ul style="list-style-type: none"> • Develop strategy for executive director succession. • Develop strategy for administration and management staff succession. • Implement succession strategy for Executive Director position. • Implement succession strategy for administration and management staff positions. | Short | Operational /Project |
| 3) Ensure Succession | 3.2) Operational knowledge transfer <ul style="list-style-type: none"> • Improve documentation of operational procedures. • Create/improve Employee Integration Manual. | Short | Operational |
| | | | |

Strategic Pillar 3 – Social/community impact

| Objective | Activity | Timeline | Activity Type |
|--|--|----------|---------------|
| 1) Increase Public awareness of Meals on Wheels | 1.1) Improve assessment and promotion of organization's community impact <ul style="list-style-type: none"> • Improve documentation and promotion regarding the benefits of MOW's operations (helps people stay in their homes, provide a link between client and community etc.). • Develop client's voice in explaining MOW. • Partner with university (Renaissance College) to document social and economic impact of organization. | Long | Operational |
| | 1.2) Increase public presence of organization <ul style="list-style-type: none"> • Organize public events such as Dolan's. • Social media campaign. • Increase media presence. • Increase networking with community partners and like-minded organizations. | Long | Operational |
| | 1.3) Increase partner awareness of MOW <ul style="list-style-type: none"> • Presentations to partners (Social Development, hospital, Mental Health, Department of Veterans Affairs). • Partner outreach (Horizon clinics, Apartment buildings bulletins board, flyers, etc.). • Free meal trial. | Long | Operational |

| Objective | Activity | Timeline | Activity Type |
|---|---|----------|---------------|
| 2) Expand relationship with community | 2.1) Community Partners <ul style="list-style-type: none"> • Improve relationship with francophone, first nation and multicultural communities. • Develop collaborative projects with organizations serving target groups. • Increase consultation with community partners and organization (York Care Day center, Fredericton Boyce Farmer's Market, Seniors Centers, Churches). | Long | Operational |
| | 2.2) Clients and beneficiaries <ul style="list-style-type: none"> • Improve contact with clients. • Increase client input into organization. | Long | Operational |
| 3) Improve social and community impact of organization | 3.1) Organizational improvements and additions <ul style="list-style-type: none"> • Improve youth engagements and involvement. • Increase local food content. • Wheels to Meals relaunch and growth. | Long | Operational |
| | 3.2) Project and partnerships <ul style="list-style-type: none"> • Create fundraising and project development and coordinator position (same as 2.2). • Develop projects to increase MOW capacity to help with their clients' autonomy and improve their link with the community. | Long | Operational |

Conclusion

The Strategic Plan outlined in this document is meant to serve as a guide on a journey rather than an inflexible path forward. In its ideal implementation, the hopes are that it would be more of a living document able to be adapted to changing realities. The ultimate goal remains the same, but the pathways chosen to reach it can be many and change with time. The vision that emerged from the consultation process was clear, optimistic and energizing. That is the proverbial peak and what must be kept as essential. Actions can vary and be adapted as long as they remain in harmony with this vision.

In conclusion, a deep gratitude must be expressed to all of the devoted and passionate people who have contributed to assembling this Strategic Plan. Board members, volunteers and staff members were very generous with their time and input through the consultation process. The level of engagement and support from the different stakeholders that participated is primarily responsible for any success that this process has met. It is hoped that the result is up to, not only their expectations, but also of their commitment to Meals on Wheels Fredericton.