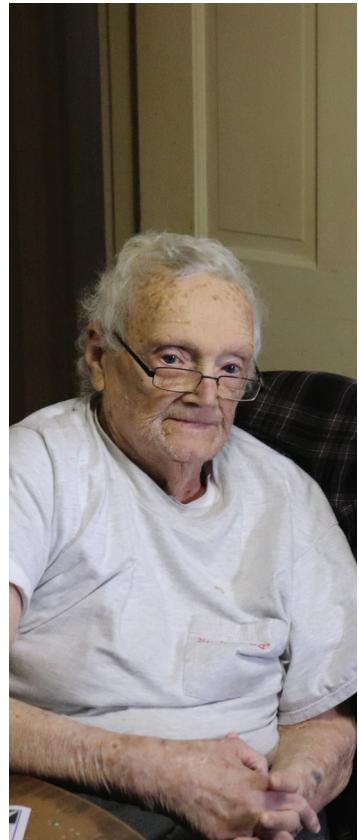


# STRATEGIC PLAN

2022-2025

Planning for our next 20 million meals



*Meals on Wheels*  
OF RHODE ISLAND

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**We are so excited to share this strategic plan, which marks Meals on Wheels of RI's milestone of having served its 20-millionth home-delivered meal and charts a course to reach service of its next 20 million meals.**

This plan also follows a seismic societal upheaval over the past two years. The COVID-19 pandemic helped to highlight the critical issues of food insecurity and social isolation among older and homebound adults. During the pandemic, we were able to continue our vital services without interruption through the commitment of our team, the leadership of our board of directors, the bravery of our volunteers, and the generosity of donors and supporters.

As we emerge from this challenge, we are now facing another—conflict on the other side of the world that is significantly impacting the cost of food, fuel, and daily living. Just as we did during the pandemic, we are shifting, evolving, and responding to meet these new challenges and the needs of those we serve.

This strategic plan will help us navigate these uncertain times and draws on our innovative and caring spirit. We recognize that in a rapidly changing world, we need to be nimble, responsive, and resourceful to address social determinants of health, such as food insecurity and social isolation, and advance health equity. This plan does so by creating the space for new and innovative funding streams and service delivery models while continuing our commitment to our signature programs and to serving homebound older adults with more than a meal.

We thank the Board of Directors, the Design Team, our team, and the many in our community who contributed their thoughts and perspectives to create this plan.

We look forward to continuing our partnership with you as we serve our next 20 million meals.

Sincerely,

Meghan Grady, Executive Director  
Meals on Wheels of RI

Corey McCarty, Board Chair  
Meals on Wheels of RI

# OUR PLANNING PROCESS

The planning process was launched in fall 2021 with the generous support of an anonymous donor and a capacity building grant from the Rhode Island Foundation.

Meals on Wheels of RI (MOWRI) engaged Fio Partners, LLC, as its strategic planning consultant to help inform its strategic direction and create a corresponding plan. Information was gathered from sources to capture observations of the organization from a variety of perspectives and included extensive input from internal and external stakeholders, through:

- Board Survey
- Key Stakeholder Interviews
- National Expert Interviews
- Management Assessment
- Team Survey
- Review of Community and Market Data
- Review of Related State Plans and Initiatives

The information gathered was shared with the Board at an in-person retreat in April 2022. At the retreat, the Board provided input on MOWRI's mission and vision and critical areas of programmatic evolution, relationships, and the further development of the Board. MOWRI leadership team and the Design Team used this input and feedback to shape this strategic plan.

## Members of the Design Team

Kevin Millonzi, Board Chair, 2019-2022  
*Millonzi's Fine Catering*

Eliza Sutton, MPH  
*Outreach Associate*

Corey McCarty, Board Chair, 2022-2024  
*Commonwealth Care Alliance®*

David Alves, MBA  
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*Strategy & Innovation Director*

Christina Pitney  
*Blue Cross & Blue Shield of Rhode Island*

Meghan Grady, MPA  
*Executive Director*

# WHAT WE LEARNED

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## OUR PROGRAMS AND SERVICES AND THEIR CONTEXT

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### ***Relationships are the Center of our Work and the Strength of Our Service Delivery Model***

Stakeholder, team, and board input all highlighted the important role that relationships play in the organization's work. The trust and rapport that paid delivery drivers and volunteers develop with clients are the organization's "value-add," as it enables MOWRI to provide clients with more than a meal. It is also a significant differentiator in the marketplace compared to other meal delivery services. As MOWRI looks to expand and scale its activities, it will be important to ensure that the relational aspects of the work are centered in the service delivery model.

### ***We Serve Distinct and Overlapping Markets Related to Food Insecurity and Aging in Place***

There are two primary populations of older adults that MOWRI currently serves and is likely to serve: (1) individuals that are home-bound and are experiencing food insecurity and (2) individuals that have and are seeking to age in place. These two populations have different funding streams, reimbursement models and requirements, needs, and expectations. While some individuals may overlap, the organization will need to continuously assess its capacity and priorities as it relates to the different needs, goals, and potential service models needed to serve these two populations, as well as to position itself in terms of competition.

### ***The Introduction of New Financial Resources is Contributing to Greater Opportunity and Competition***

Health insurers are increasingly considering home-delivered meals as an essential benefit for its members and a market differentiator with respect to its competitors. This is helping to bring new capital/financial resources into the home-delivered meal market. In addition, meal delivery companies that provide prepared meals and grocery delivery services are also proliferating. Finally, there is also a "food as medicine" movement that is focused on the use of medically tailored meals. The result is a combination of an influx of new resources and new competition for those resources to serve a growing demographic—older adults. As MOWRI seeks to expand its activities, it will likely find itself in an increasingly competitive marketplace.

## OUR RELATIONSHIPS

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### ***Deeper, Broader, and More Diverse Community Partnerships Can Help to Extend our Reach, Build Community Awareness, and Strengthen Our Brand***

The pandemic has highlighted the importance for many organizations, including MOWRI, of the role of partnerships and collaboration in engaging communities and deepening impact. To the extent that MOWRI seeks to become better known, build its brand and reputation, and increase and diversify its base of referrals, intentional partnerships with trusted and connected community and civic organizations will be needed.

### ***There is Space and Opportunity for MOWRI to Become a Statewide Leader and Advocate***

Given Meals on Wheels national recognition and the local relationships in place, there is an opportunity for MOWRI to take a more active role as a leader and advocate as it relates to the needs of Rhode Island older adults overall, as well as in addressing the root cause and structural forces that lead to food insecurity among older adults. Some Meals on Wheels organizations around the nation are assuming leadership roles within their communities on this and related issues, a focal area MOWRI may also want to consider.

## OUR INFRASTRUCTURE, CAPACITY, AND ORGANIZATION

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### ***Our Physical Location Needs to Better Serve our Organization and our Clients***

As MOWRI evolves and scales its service delivery models, key opportunities for infrastructure investment emerged from the planning process. For one, the current physical plant provides limitations and constraints on organizational growth and impact. The concurrent facility assessment will help identify opportunities for improvement and options for a new or redesigned physical plant. There may also be considerations as it relates to MOWRI's location depending on where it wants to focus impact.

### ***There is an Opportunity to Redesign our Volunteer Strategy***

Both external and internal stakeholders raised questions about the current volunteer model. There were also questions raised about volunteer recruitment, management, training, and oversight, particularly for volunteers that other organizations recruit.

### ***We Need to Build our Organizational Structure to Increase Our Capacity for Impact***

The planning process has helped to highlight the need to further develop MOWRI's organizational capacity for impact. This includes assessing staffing needs to ensure sufficient bandwidth to lead the organization forward with this plan while continuing to manage and oversee day-to-day operations. A growth strategy for the organization will necessitate growing the infrastructure to support efforts to expand and deepen MOWRI's community reach.

### ***We are in the Early Stages of our Diversity, Equity, and Inclusion Journey***

MOWRI has taken important initial steps in its DEI journey, most recently by implementing its culturally responsive meals initiative. At the same time, the aging population in Rhode Island, like the state as a whole, is becoming increasingly diverse in terms of race, culture, and ethnicity. As MOWRI seeks to expand its community-based impact, the organization has recognized the importance of furthering its DEI work with its team and Board.

### ***There are Opportunities to Diversify and Further Strengthen Our Board to Help us Advance Our Impact***

The Board of Directors has recognized the need to further its own development and evolution. Key considerations regarding Board diversity and composition, individual and collective member skills and knowledge, and creating a pipeline for future Board membership and leadership all emerged during the planning process.

# VISION, MISSION, VALUES

As part of the strategic planning process, we revisited our mission, vision and values to ensure they were current and applicable for the course of this plan, and they have been revised to reflect our evolution as an organization.

## OUR VISION

A Rhode Island where those we serve live well-nourished lives with independence and dignity.

### Our Aspirations

- Those we serve are nourished, healthier, and able to live more independently and age in place as a result of our programs
- Those we serve will have access to a social support system that reduces isolation (and other social determinants of health) and to a range of other services and supports as a result of our programs
- Those we serve will live without fear or uncertainty associated with food insecurity as a result of our programs
- The families of those we serve will have peace of mind as a result of our programs
- The State will benefit from a healthier and more independent population through reduced health care and social costs as a result of our programs

## OUR MISSION

Our mission is to meet the nutritional and social needs of those we serve so that they can maintain safe and independent lifestyles

### Our Aspirations:

- Meals on Wheels of Rhode Island is top of mind among donors, volunteers, and those we serve
- Meals on Wheels of Rhode Island is supported by stronger systems and infrastructure that enable organizational growth and expansion
- Meals on Wheels of Rhode Island is funded by a diverse, sustainable, and growing array of sources
- Meals on Wheels of Rhode Island is a great place to work and volunteer
- Meals on Wheels of Rhode Island is a trusted and valued community partner
- Meals on Wheels of Rhode Island is recognized for its broad societal impact and outcomes

## OUR VALUES

MOWRI CARES are the values that we commit our team, Board, and volunteers to uphold in every interaction with each other, with those we serve, and with our community.

- **Compassion**—We seek to build meaningful and authentic relationships with those we serve and support. We respect the dignity of each individual we encounter and respond with compassion in every interaction.
- **Accountability**—We are responsible stewards—of our funds and our relationships—and trustworthy in all of our actions.
- **Respect**—We meet people where they are and make them feel welcome, included, and important in our organization. We appreciate and embrace each individual, what they share in common and how they are different.
- **Excellence**—We continually strive to do our best for those we serve, our teammates, and the community. Where possible, we use best practices, measure our effectiveness, and continuously seek to improve.
- **Steadfastness**—We go above and beyond in serving our clients, supporting our teammates, and responding to the community. We are proactive, flexible, and customer-focused when serving the community.

As a result of the strategic planning process, we identified two primary goals and four supporting goals to achieve our vision for 2025.



# GOAL 1

## Develop Opportunities to Innovate and Scale Our Model

**RATIONALE:** There is interest in the community for MOWRI to expand and extend its work to include additional service populations that are food insecure and/or desire to age in place or live in the community. These populations include individuals living with HIV/AIDS, pregnant and postpartum women and their families, and others. Expanding programming to include these and other service populations can provide MOWRI an opportunity to increase its reach and its learning, as well as to increase name recognition and diversify revenue streams. Through a process of intentional pilot testing and learning, MOWRI can explore these opportunities while protecting and preserving its trusted brand.

### Strategy 1\*

Develop criteria to pilot new approaches to help individuals to live safely and independently

#### Potential Tactics

- Fund a position focused on strategy and innovation\*
- Continue to understand the opportunity to advance health equity by addressing social determinates of health
- Develop metrics for assessing pilot initiatives and criteria for determining whether they are successful and should be scaled\*
- Brand and message pilot work to build stakeholders understanding of the organization's evolution
- Partner with healthcare entities to access outcome data to measure and prove return on investment\*
- Adopt Plan Do Study Act (PDSA) to assess results and determine scalability

### Strategy 2\*

Develop, implement, and evaluate pilot projects to serve individuals who would benefit from aspects of the More Than A Meal model

#### Potential Tactics:

- Gather and analyze information about the industry, business environment, competitors and their products for competitive intelligence\*
- Continue to advance efforts to build relationships with healthcare and health insurance entities (including AEs and ACOs) to develop additional nutrition benefits in conjunction with other supportive services for enrollees
- Explore opportunities to serve individuals in the other Medicaid Waiver programs (i.e., Developmental Disabilities Waiver) Research and consider funding opportunities from the federal government (e.g. HHS, NIH, CDC, USDA)

### Strategy 3

Become a statewide leader in the area of food as medicine

#### Potential Tactics

- Develop a deep understanding of food as medicine from available research and networking with peer organizations nationwide
- Understand statewide environment (e.g. leading chronic diseases) and potential opportunity for impact (e.g. number of eligible consumers)
- Develop, implement, and evaluate pilot projects to serve individuals who would benefit from a medically tailored meal
- Continue to advance advocacy efforts with health insurance entities to develop a medically tailored meal benefit

\* denotes Year 1 work

## GOAL 2

### Implement a sustainable business model to maintain and grow our signature programs

**RATIONALE:** Record inflation has significantly impacted MOWRI's costs in terms of meals and transportation, among other areas. As ARPA funds expire in 2024, it is important for MOWRI to evaluate its business model to better understand where there are opportunities and challenges to ensure long-term sustainability. In particular, leveraging existing Medicaid waiver programs (and advocating for expanded eligibility), can help ensure that MOWRI's focus remains on those most in need.

#### Strategy 1\*

Build scenarios for a sustainable business model based on existing revenue sources that meets community needs

##### Potential Tactics:

- Educate stakeholders and community leaders about historical and anticipated future funding challenges\*
- Increase organizational expertise of the Medicaid Waiver programs (eligible populations, funding, requirements, etc.), with a particular focus on the state's Long-Term Services and Supports program\*
- Identify and quantify community need and determine priority groups within the homebound older adult population
- Establish pro forma budgets that map out a range of options that are mission-aligned and financially feasible\*

#### Strategy 2\*

Establish short-term and intermediate-term funding and resource development plans to ensure maintenance of current daily meal home deliveries.

##### Potential Tactics:

- Advocate for State Medicaid to reimburse for home-delivered meals as a preventative service\*
- Increase utilization of home-delivered meals amongst LTSS eligible populations that targets the most vulnerable and diverse population of older adults being served\*
- Analyze the potential opportunity to expand the number of meals delivered to LTSS clients\*

#### Strategy 3:

Assess meal preparation cost and structure as well as evaluate options to drive cost savings over time.

##### Proposed Tactics:

- Conduct a feasibility study to explore meal costs
- Explore alternative meal suppliers/caterers' options to contain costs

- Assess feasibility and cost/benefits of meal preparation and delivery. Continue to manage catering contract to ensure maximum value and return on investment.

#### Strategy 4

Evaluate criteria for qualification into programming to ensure those with the greatest need are prioritized

##### Proposed Tactics:

- Formalize screening process and establish target scores for enrollment
- Formalize targets to ensure that the service implementation reflects delivery in high need and underserved communities for outreach and enrollment
- Formalize target to ensure that service implementation reflects the diversity of the state

#### Strategy 5\*

Establish short-term and intermediate-term funding and resource development goals to ensure maintenance of current daily congregate meals served.

##### Proposed Tactics:

- Explore opportunities to reposition the Capital City Cafe Program\*
- Explore opportunities to expand the Restaurant Dining Voucher Program\*

#### Strategy 6\*

Formalize strategy to expand the pet food and senior wish initiatives to serve participants statewide.

##### Proposed Tactics:

- Establish annual growth targets\*
- Identify additional resources to fund program expansion
- Promote availability of these supplemental resource initiatives to our clients

\* denotes Year 1 work

## GOAL 3

### Diversify and Deepen our Relationships to Extend Our Reach and Increase our Impact

Rationale: MOWRI's ability to sustain and increase impact, as well as to secure the resources necessary to do so, relies on an array of key partnerships and relationships with all sectors of the community. For generating referrals, coordinating services, raising funds, building brand awareness, and securing charitable support, deep and transformational relationships are needed. As MOWRI strives to increase its impact in BIPOC communities, specific attention will need to be given to building trust and connections with BIPOC-led and BIPOC-serving organizations and communities.

#### **Strategy 1\***

Expand and diversify our fund development efforts to sustain 25% revenue growth over three years and to ensure our financial sustainability

##### *Potential Tactics:*

- Launch our multi-year fund development plan\*
- Continue to strengthen and grow the organization's existing portfolio of philanthropic revenue streams (e.g., major gifts, grants and foundations, annual fund, public awareness campaigns, and fundraising event(s)\*
- Invest in research to understand the giving potential of existing and potential donors\*
- Leverage a donor database/customer relationship management software to drive data-based decision making
- Explore addition of a Major Gifts Officer to cultivate, solicit and obtain major gifts
- Expand strategies to increase contributions to endowment and establish growth targets

#### **Strategy 2\***

Develop and implement a marketing and outreach plan that further positions MOWRI as a top-of-mind resource as well as a charity of choice serving the community

##### *Potential Tactics*

- Create an inventory of existing communications, public relations, and partnership efforts to ensure coordination and alignment\*
- Formalize the digital marketing strategy to include search engine optimization
- Create a formal marketing plan to drive communications and messages
- Segment markets and messages to MOWRI's many "publics" to ensure that messaging is targeted, and platforms are used strategically; ensure that all key current and potential future stakeholders are considered and that marketing and communications to BIPOC communities are culturally appropriate
- Identify priority need communities for engagement; continue to provide presentations and build relationships with key and trusted community partners and connectors.\*
- Enhance the MOWRI website to improve the visitor and donor experience as well as offer more functionality and accessibility (i.e., Donation option; signing up to volunteer, referral process, ADA compliant, translation)
- Engage a marketing and communications consultant as needed to guide marketing plan creation and execution
- Leverage national and peer Meals on Wheels organization's communications resources

**Strategy 3\***

Develop a partnership strategy that determines (and develops) partnerships that support our innovations and furthers our efforts to serve diverse populations in the community

*Potential Tactics:*

- Continue to advance utilization of the Unite Rhode Island referral platform\*
- Define and inventory existing partnerships\*
- Identify partnerships needed to advance our current work (e.g., Medical professionals, Nutrition, academia, mental/behavioral health professionals)\*
- Explore strategic alliances and potential for deeper partnerships (e.g., joint venture, merger, acquisition)
- Consider obtaining a CRM system to assist in managing and coordinating partnerships and relationships and building feedback loops that regularly assess and communicate the value of these partnerships (e.g., number of shared clients, number of meals provided to shared clients, etc.)

**Strategy 4\***

Develop and implement an advocacy program that advances MOWRI's strategic goals and addresses the needs of MOWRI's priority service populations

*Potential Tactics*

- Develop an annual advocacy agenda\*
- Continue to build connections and relationships with state elected and appointed officials\*
- Provide advocacy training to board members

# GOAL 4

## Develop a High Performing Structure and Model that Further Strengthens our Connections with Those We Serve

**RATIONALE:** There is a need to increase MOWRI's capacity to support its relational work with its clients, partners, volunteers, and other stakeholders, as well as to ensure that its practices minimize risk exposure to the organization.

### Strategy 1\*

Build an organizational structure and staffing model that advances our priorities and supports our capacity to deliver results.

#### Potential Tactics:

- Evaluate departmental needs and capabilities
- Develop a comprehensive recruitment plan that prioritizes older adults and the BIPOC population
- Create a comprehensive retention plan that assesses the needs of our teammates and creates opportunities for growth, professional development, and advancement as well as succession planning
- Continue to conduct wage studies to ensure that pay is equitable and in line with the market\*
- Formalize team training opportunities and align with program performance outcomes\*
- Adopt Clifton StrengthsFinder to empower team members and advance collaboration\*
- Align staff training investments with program performance outcomes
- Create a recognition program that embodies our CARES values and operational success\*
- Develop a succession plan for leadership positions to ensure continuity

### Strategy 2\*

Assess and strengthen our volunteer model to provide an optimal experience

#### Potential Tactics

- Conduct informational interviews to identify areas of improvement\*
- Conduct a volunteer survey to measure satisfaction\*
- Analyze strengths of the model and opportunities for growth\*
- Build a recruitment and retention plan to ensure continuity related to program sustainability
- Formalize the onboarding and training process
- Measure volunteer satisfaction to inform quality improvement
- Communicate in-kind value of volunteer impact annually

### Strategy 3\*

Continue to advance our DEI journey through shared learning and development

#### Potential Tactics

- Continually assess the landscape for opportunities to enhance cultural responsiveness of programs\*
- Regularly update the Diversity, Equity and Inclusion plan\*
- Build an inclusive and diverse workplace that is representative of the community
- Perform organization and programmatic activities through an intersectional lens\*
- Ensure communications are culturally competent\*
- Ensure programs and services offered are culturally relevant
- Advance relationships by subcontracting with minority community-based organizations\*
- Provide regular education and training for team and Board\*

### Strategy 4

Develop a culture of continuous quality improvement

#### Potential Tactics

- Adopt PDSA as an organization wide approach
- Train all team members in PDSA and engage them in quality improvement initiatives
- Develop a Quality Improvement plan for the organization
- Regularly assess and meet requirements of our funders and partners to ensure compliance with applicable regulations

\* denotes Year 1 work

# GOAL 5

## Invest in Our Infrastructure To Support Operational Efficiencies

**RATIONALE:** There is a need to continually strengthen MOWRI's infrastructure to further advance and capitalize on the modernization investments made to date. Ensuring a supportive work environment, aligning resources with needs and priorities, and ensuring operational efficiencies and excellence are key priorities for the next three years.

### Strategy 1\*

Establish a financial business model and sustainability plan to ensure the organization's long-term success and impact.

#### Potential Tactics

- Establish a multi-year budgeting and forecasting model that projects current and anticipated future revenue and expenses\*
- Establish target ratios for revenue diversification \*
- Establish a Board approved distribution policy for our endowment

### Strategy 2\*

Develop a facility plan for the organization that supports operational efficiencies, community engagement, and a modern work environment

#### Potential Tactics

- Review results of facility assessment and recommendations\*
- Develop an annual capital budget and funding mechanism to regularly reinvest in our assets

### Strategy 3

Continue to invest in our digital transformation to support business operations

#### Potential Tactics:

- Continue to invest in education and training to increase productivity
- Continue to invest in training and testing of the security environment

- Review existing customer relationship management platforms (e.g. DonorQuest, ServTracker) to evaluate relevance and effectiveness
- Establish the capability to manage and secure client information in accordance with HIPAA and other compliance requirements
- Further integrate existing systems and databases with the goal of establishing comprehensive data systems that capture, document, and disseminate information to inform decision making.

### Strategy 4

Develop an enterprise risk management plan to continually assess and prepare for potential exposures

#### Potential Tactics:

- Continually update our disaster response plan
- Establish annual contingency plans as part of budgeting process
- Review and refresh safety-related training for all team members
- Provide annual cybersecurity training for all team members
- Develop a calendar for compliance checks (e.g., personnel, vehicles, etc.)

\* denotes Year 1 work

# GOAL 6

## Further Diversify and Develop our Board to Increase our Capacity for Impact

**RATIONALE:** The Board is a critical partner in advancing MOWRI's mission and impact. Board survey results indicate there is an opportunity to further diversify the Board, further clarify roles and responsibilities, provide training in governance and key content areas, and find ways to continue to meaningfully engage Board members in the work of the organization.

### Strategy 1\*

Further develop our Board across all dimensions of diversity

#### Potential Tactics

- Conduct a Board assessment to map current Board member skills, experience, and backgrounds against organizational needs and priorities\*
- Establish a Board recruitment strategy to recruit prospective Board members both within and outside of current networks
- Expand the use of committees as an on-ramp to future Board service
- Strengthen our Board orientation and onboarding program, including the potential use of Board members as mentors, to successfully engage new Board members

### Strategy 2\*

Develop and implement a Board education and training program to continuously build the skills and knowledge of our volunteers to help them better fulfill their governance and community ambassadorship roles.

#### Potential Tactics:

- Provide annual training on Board governance\*
- Include training topics of interest as part of standing board education agenda item for all Board meetings

\* denotes Year 1 work

# MONITORING OUR PROGRESS

## Implementation Approach

The Strategic Plan is a living document that is a road map by which the team of MOWRI should be held accountable. The plan should be utilized to create annual goals for MOWRI. Progress against annual goals can be monitored through regular updates on plan progress at Board meetings and consistent reporting on desired key results noted below.

In addition, an implementation plan will be used to track progress against the selected strategies and tactics for the first year and then updated accordingly for each successive year.

## Key Results

The implementation of the Strategic Plan is envisioned to enact a set of measurable key results. For each goal, the table below outlines key areas of measurement and proposed key results. The proposed key results are based upon areas of measurement that currently exist within the organization where progress can be tracked. In these cases, targets were developed by the leadership team.

In some areas, baseline data, as well as leadership team's capacity to measure and report on progress, will need to be created as part of the first year of implementation. It is envisioned that a dashboard of key results would be created to track progress against key results, support organizational learning, and be reported out periodically throughout implementation.

