2016 Goals and Priorities
Meals on Wheels for WNY / Meals on Wheels Foundation of WNY

Finance Department (Three Full-Time Team Members)

- Automate MLTC (Managed Long-Term Care) claim processing
  - Utilize electronic processing for as many contracts as possible
  - Document process for each separate contract

- Develop proficiency with new accounting software
  - Establish better and faster reporting
  - Track restricted grants within system
  - Utilize cost center tracking to develop data for future forecasting
  - Update accounting policies to reflect new system changes

- Design better analysis measures for organization
  - Utilize data from client program and accounting system
  - Full meal served report for commissary
  - Monitor Bateman’s other contracts
  - Summary dashboard for important numbers

- Continue to develop an equipment replacement projected schedule for commissary equipment in collaboration with the MOW Facilities team and the Bateman management team.
  - Project for 10 year financial impact

- Attend low-cost computer training
  - All team members to attend Excel training to increase skills and productivity
  - Other software training as necessary

- Evaluate and improve upon procedures to minimize costs for:
  - Daily route distribution
  - Site expense account monitoring
  - Site supply utilization
  - Other areas noted through the year

- Review Human Resource Policies, Procedures and Forms utilized
  - Implement a process to ensure an annual review and edit of policies as needed with the goal of the first full review to occur within this calendar year
  - Create/Modify necessary forms
  - Audit all personnel files
Nutrition Department (Five Full-Time and One Part-Time Team Members)

- Launch made without gluten pilot in Q1. Develop plans to identify additional clients to participate in the pilot, which will continue into Q2.

- Develop and roll out plan with Bateman to offer lactose free milk program for home-delivered meal and congregate sites in Q1. Will need to determine how ServTracker can identify these clients for tracking and billing.

- Achieve 2,055 home visits and 4,958 test meals (average of 2014 and 2015).
  - 2014 home visits – 2,219
  - 2015 home visits – 1,892
  - 2014 test meals – 5,116
  - 2015 tests meals – 4,800

- Track and monitor the percentage of test meals tested by the sites versus the dietitians with the goal of the sites handling the majority of the test meals. It is important to understand that the dietitians need to make site visits to audit meal handling safety and ensure that the sites are following proper procedures, including the handling of test meals.

- Implement a quality assurance process and schedule for the Director of Nutritional Services to follow-up on dietitians’ home visits by contacting a subset of clients to discuss their level of satisfaction and answer any questions.

- Assist in building the client media pipeline by identifying clients who are willing to participate in media events. Methods of doing it will include daily/ongoing calls, home visits, and caregiver calls. Quarterly team goal will be 6 clients (average 1/dietitian/quarter).

- Support the full scale cook chill implementation as appropriate when Bateman initiates start up.
  Time frame: TBD

- Support USDA certification process as appropriate when Bateman initiates application process.
  Time frame: TBD

- Conduct a Nutrition Education survey with all home-delivered meal clients. (Bateman conducts a client satisfaction survey in Q2. Nutrition team will work with Bateman on this process.) Create an action plan to address survey results as appropriate.
  Completion date: Q3
- Develop and begin to implement collaboration plans to better service our clients with Mobile Pharmacy and the University of Buffalo School of Pharmacy as appropriate by the end of Q1.

- Support 2016-2020 strategic plan initiatives as appropriate.

- Document Nutrition ServTracker procedures by the end of Q2.

- Quarterly review and update the Nutrition section of the policy and procedure manual and the County Audit binder.

**Social Work (Five Full-Time Team Members)**

- Achieve the budgeted revenue for MLTC/Medicaid Funded Programs of $1.065M.

- Achieve the budgeted revenue goal for Fee-for-Service of $245K.

- Achieve 2000 referrals and 1500 cases opened (average of 2014 and 2015).
  - 2014 referrals – 2,039  2015 referrals – 1,952
  - 2014 cases opened – 1,571  2015 cases opened – 1,413

- Assist in building the client media pipeline by identifying clients who are willing to participate in media events. Methods of doing it will include daily/ongoing calls, Title XX in-person visits, and caregiver calls. Quarterly team goal will be 5 clients (average 1/social worker/quarter).

- Launch made without gluten pilot in Q1. Develop plans to identify additional clients to participate in the pilot, which will continue into Q2.

- Continually recommend MLTCs to potential Title XX clients as appropriate.

- Develop and begin to implement collaboration plans to better service our clients with Mobile Pharmacy and the University of Buffalo School of Pharmacy as appropriate by the end of 1Q2016.

- Conduct three MLTCs in-service informational meetings in 2016 to educate local representatives and promote MOW as a provider of choice.
- Conduct five in-service meetings per quarter (one per social worker) with medical facilities (rehab centers, orthopedic clinics, doctors, insurance companies, etc.) to promote MOW and Meals Express service.

- Document Social Work ServTracker procedures by the end of Q2.

- Support 2016 – 2020 strategic plan initiative as appropriate.

- Quarterly review and update Policy and Procedure manual and County Audit binder.

**Site Services (One Full-Time and 51 Part-Time Team Members)**

- Consistently promote and monitor sites’ adherence to food safety policies and procedures. Implement incident tracker by site to monitor performance. Consistently implement corrective action plans as appropriate.

- Ensure quarterly volunteer training and sign-off process is timely and complete. Maintain binder of sign-off forms and training documents.

- Work with site managers to limit the number of office staff members delivering meals with less than 24 hours notice to an average of 7 routes per month (12.5% decrease - was 8 per month in 2015 – 12 per month in 2014).

- Reduce the number of site assistants by 2 (10% reduction) and replace with volunteers in 2016. Site assistants were reduced by 6 in 2015.

- Support one volunteer recruiting table event per quarter.

- Continually counsel the site managers to achieve 100% attendance of 3 out of the 4 All Staff meetings.

- Support 2016 -2020 strategic plan initiatives as appropriate.

- Quarterly review and update Policy and Procedure manual and County Audit binder.
Communications and Government Affairs (One Full-Time and 1 Part-Time Team Members)

- Track web visits with a goal of 24,150 sessions/visits and 17,000 new visitors (5% increase / 5% increase)
- Increase community awareness, as measured by press coverage with a goal of 224+ clippings (5% increase)
- Increase online engagement, with a goal of 230 new Facebook likes (5% increase)
- Increase online engagement, with a goal of 275 new Twitter followers (5% increase)
- Enhance video activity, with a goal of at least 6 videos / vignettes produced this year for use in person, on our website and via social media (200% increase)
- Further deepen media relations and develop personal relationships with more local media professionals
- Further deepen government relationships, including through tours, ride-a-longs, office visits and topic-specific emails or visits
- Engage with local leaders to learn more about next-level government affairs work
- Have at least five meetings / touch points at the federal level
- Have at least ten meetings / touch points at the state level
- Have at least 14 meetings / touch points at the county level
- Have at least six meetings / touch points at the city level
- Have at least 11 meetings / touch points at the municipal level

Volunteer Relations (One Full-Time Team Member)

- Actively manage all aspects of the recruitment process, with a goal of 475 or more new volunteers (5% increase)
- Reduce the instance of newly inactive volunteers, with a goal of 300 or less volunteers leaving during 2016 (17% reduction from 2015 goal)
- Attain an active volunteer base of at least 1845 individuals (tabulation based on other goals)
- Recruit and onboard at least 15 new Adopt-A-Routes, for a total of at least 79 Adopt-A-Routes (down slightly from 2015 actual – low hanging fruit year; up 187% from 2015 goal)
- Source, schedule and staff at least 30 speaking engagements (5% increase)
- Source, schedule and staff at least 70 tabling events (5% increase)
- Reach and maintain 100% volunteer coverage for the front-desk / reception function
Support Services (Two Full-Time Team Members)

- Develop and implement robust departmental cross-training plan to ensure 100% redundancy
- Further develop deep expertise in all relevant uses of SERVtracker
- Continue to proactively manage front-desk coverage to ensure efficient use of volunteers and employees and to maximize use of volunteers’ time

Foundation (3 Full-Time and 1 Part-Time Team Members)

- Raise $1,019,500 in total philanthropic support, which includes commissary equipment and meal delivery ovens (12/31/2016)
- Raise up to $200,000 to purchase needed equipment for the Agency, Commissary and Community Center (12/31/2016)
- Secure funding for the ovens - approximately $165,000 (2016-2017)
- Continue to build a successful sustainable funding program, including our Hunger and Hope tours and our Breakfast of Hope (12/31/2016)
- Improve efficiency of and expand where needed to increase and improve cultivation, acknowledgement process for donations (6/30/2016)
- Continue to evolve Plate Expectations fundraising event to boost attendance and community support of mission (9/30/2016)
- Improve tracking and management of board-related activities, including on-boarding process, ongoing board member expectations and committee participation (6/30/2016)
- Develop major giving prospect list, consisting of 50-100 individuals. (6/30/2016)
- Increase the number of Major Donors by 10% (290 donors total – individual and corporate). (12/31/2016)
- Increase the total amount of contributions by the Distinguished Donor Society to $200,000. (12/31/2016)
- Launch large-scale planned giving initiative. (12/31/2016)
- Develop planned giving prospect list, consisting of 50-100 individuals. (6/30/2016)
- Initiate Legacy Giving Society for those who have expressed their plans to leave Meals on Wheels in their will. (3/31/2016)

- Gain 10 new planned gift commitments. (12/31/2016)

**Facilities (2 Full-Time Team Members)**

- Painting of the CLC and all Commissary doors. (6/30/2016)

- Implement a database for inventory of maintenance supplies. (3/31/2016)

- Explore options for a new phone system and make recommendations. (6/30/2016)

- Complete hardware and software upgrades to the MOW IT system. This includes installing a new server, upgrading Microsoft office, exchange and utilizing the cloud. (3/31/2016)

- Evaluate all copy needs, printing functionality, and cost for services. (6/30/2016)

- Improve the occupancy rate of the CLC from 35 to 40 (10% increase) events annually. Achieved by cold calling, advertising and attending various public events. (12/31/2016)

- Evaluate the security system for the central office, community center and commissary and make recommendations. (3/31/2016)

- Create and conduct an RFP for IT services for the organization and select a successful vendor. (12/31/2016)