



STRATEGIC PLAN 2024-2027

**Revised by the Board of Directors
May 28, 2024**

**Originally Adopted as the 2023-2026 Plan by the Board of Directors
April 25, 2023**

Strategic Planning Services Provided By:





INTRODUCTION

Meals on Wheels Yolo County is writing the next chapter in its story. With passionate new leadership, empowered new staff and an engaged, deeply committed Board, MOW Yolo is assessing the nutritional and social issues faced by seniors in our community and the leadership role we need to play to overcome them.

The Strategic Plan that follows reflects these challenges and opportunities.

This is not a “maintenance” Strategic Plan. Status quo will not realize the ambitious Vision of MOW Yolo or, more importantly, address the growing needs of our community. Every Goal, every Indicator, every Strategy is designed to achieve growth in terms of:

- The number of seniors we serve
- The communities we reach, particularly in rural areas of the County and West Sacramento
- Our internal capacity and infrastructure to support expansion
- The capabilities and satisfaction of the staff and volunteers who drive our Mission

From Board to staff to volunteers to stakeholders, we are energized and aligned by the scope of this Strategic Plan. It’s a bold leap forward that expands our impact, helps our clients and positions MOW Yolo for the future.



INITIAL METHODOLOGY

Initiated by the Meals on Wheels Yolo County Board of Directors and Executive Director Joy Cohan, and facilitated by The Weiss Group, this Strategic Plan reflects the collective work of the Board and organization's management team.

The Strategic Plan was developed through a participatory process that included a Strategic Planning Retreat with the Board and senior managers, the appointment of a Strategic Planning Committee, committee meetings, key stakeholder interviews and focus groups, and a discussion session with the staff and volunteers. It builds upon the organization's efforts and establishes a bold Plan for propelling MOW Yolo forward.

The Strategic Planning Process began in January 2023 and concluded in May 2023. The process was thorough and systematic. Key milestones included:

- Establishing the project scope, timeline and Strategic Planning Framework
- Reviewing background information and prior planning documents
- Conducting an organizational SWOT Analysis
- Revising MOW Yolo's Mission and developing a new Vision and set of Values
- Identifying MOW Yolo's Goals, key Strategies for achieving those Goals, and the Indicators of Achievement that will be used to demonstrate success
- Drafting the final Strategic Plan and presenting it to the Meals on Wheels Yolo County Board for approval

MOW YOLO Strategic Planning Committee

Joy Cohan, Executive Director
Eric Miller, Board Chair
Bridget Levich, Board Vice Chair
Marc Thompson, Board Treasurer
Michelle Weiss, Board Secretary
Dr. James Barrett, Board Past Chair
Alexa Torres, Program Manager

Steven Weiss, President, The Weiss Group
Monique Garcia Gunther, Associate, The Weiss Group



MISSION, VISION and VALUES

MISSION

Our Mission defines why we exist and what we do as an organization. It provides focus, drives priorities and communicates our purpose. The MOW Yolo Mission is unique, inspirational and mobilizes support for our organization and the work we do.

To nourish and engage seniors in Yolo County.

VISION

Our Vision establishes our destination and describes what we want to achieve as an organization. It provides direction and clearly communicates our aspirations.

All Yolo County seniors live nourished lives with independence, resilience and dignity.

VALUES

Our Values reflect the MOW Yolo core principles and shared beliefs. They demonstrate how we conduct business, the standards to which we hold ourselves, and define our organizational culture.

The work we do matters. We are compassionate. The seniors we nourish— and the volunteers and donors who support us— are like family. We collaborate, as a team and with the community. We value diversity and treat all people with respect. We act with integrity and accountability, as exemplary stewards of our resources. We are nimble, creative and resilient. We plan, we adapt and we overcome in pursuit of our Mission.



GOALS FOR MOW YOLO

Our Goals are our strategic priorities. They align with our Mission and Vision and establish what we will achieve. The MOW Yolo Goals are tied to measurable outcomes and determine how we will invest our time, energy and resources.

Goal 1 | Nourish and Engage More Seniors in More Communities

Goal 2 | Increase Funding to Achieve Economic Sustainability

Goal 3 | Expand Organizational Capacity

Goal 4 | Attract, Value and Retain Talented, Passionate Staff and Volunteers



GOAL 1: NOURISH AND ENGAGE MORE SENIORS IN MORE COMMUNITIES

INDICATORS AND OUTCOMES

- Increase clients served from:
 - 810 to at least 1,000 by July 2024
 - 1,200 by June 2025
 - 1,500 by December 2025
 - 2,000 by December 2027
- Increase the number of seniors served in West Sacramento from 216 to at least 300 by December 2024
- Maximize rural route participation on existing 1x/week, five frozen meals routes
- Increase consistent delivery in every Yolo County rural community by end of 2027

STRATEGIES

- Identify unserved people in need
- Identify underserved communities and constituencies (West Sacramento, rural, non-English speaking)
- Ensure that all seniors in Yolo County, regardless of race, ethnicity, language or socioeconomic status, have access to the organization's services
- Increase and tailor outreach to distinctive communities and constituencies
- Align resources to meet community need
- Establish partnerships and relationships with organizations, restaurants and businesses
- Reimagine congregate dining to enhance senior opportunities for socialization



GOAL 2: INCREASE FUNDING TO ACHIEVE ECONOMIC SUSTAINABILITY

INDICATORS AND OUTCOMES

- Double total funds by 2026 (\$2.7M to \$5.4M)
- Raise private philanthropic support from \$2M to \$3.4M by 2026
- Increase government support to \$2M by 2026

STRATEGIES

- Strengthen and refine messaging framework to serve multiple audiences
- Develop and implement a comprehensive, integrated marketing plan to increase overall visibility
- Continue to implement development plan adopted December 2023, identifying, cultivating, soliciting, stewarding and growing private philanthropy
- Create a planned giving/bequest program
- Continue to identify, evaluate and secure city, county, state, and federal funding opportunities
- Continue to position MOW Yolo as the expert on senior nutrition in Yolo County



GOAL 3: EXPAND ORGANIZATIONAL CAPACITY

INDICATORS AND OUTCOMES

- Expand kitchen capacity to 15,000 square feet by 2027
- Increase the number of volunteers each year as follows:
 - 80 more volunteers by December 2024
 - 300 more volunteers by December 2026
 - 400 more volunteers by December 2027
- Continue to develop and implement new service delivery models as follows:
 - Café Yolo Social Dining at least 1x/week in each Yolo County community by December 2024
 - “Pick-up” home-delivered meals option in each Yolo County community by December 2025
- Continue to pursue programmatic database by December 2025

STRATEGIES

- Conduct a comprehensive volunteer recruitment and retention effort
- Develop and invest in fundraising capabilities
- Explore new delivery models and schedules
- Evaluate, prioritize and invest in the organization’s technology needs and opportunities (i.e., donor/client/volunteer databases)
- Explore kitchen facility options
- Explore partnerships and build relationships with regional universities, colleges, community colleges and vocational schools to develop academic opportunities for students
- Continue to build a diverse and active Board that reflects the communities that we serve



GOAL 4: ATTRACT, VALUE AND RETAIN TALENTED, PASSIONATE STAFF AND VOLUNTEERS

INDICATORS AND OUTCOMES

- Implement a twice-a-year staff satisfaction survey, establish baseline metrics, and achieve a satisfaction rating of 80% or better
- Achieve a staff retention rate of 75% or better
- Implement a twice-a-year volunteer satisfaction survey, establish baseline metrics, and achieve a satisfaction rating of TBD (TBD to be resolved by December 2024)
- Achieve a volunteer retention rate of TBD (TBD to be resolved by December 2024)
- Conduct an annual salary review to ensure that staff compensation overall is at least at the median point in the region
- Ensure each employee engages in a twice-a-year performance management dialogue with their supervisor

STRATEGIES

- Foster a culture based on our Values that inspires staff and volunteers
- Review and update staff onboarding, training and communication policies
- Review and update volunteer onboarding, training and communication policies
- Develop staff incentive and recognition programs
- Develop volunteer recognition and retention programs
- Establish consistent communication plan to inform volunteers and solicit feedback
- Invest in professional development
- Create opportunities for staff and volunteers to meet and interact