Overview of Results from Agency Pulse Survey

Conducted October-November 2018 to allow agencies to share the trends and issues they anticipate affecting their work from 2020-2025 to inform Second Harvest Heartland's new strategic plan.

Key Takeaways- Client Needs and Services

- Responses were similar across most questions despite geographic and programmatic differences. Where differences did exist, those differences are described in more detail below.
- Overall the strong majority of respondents believed there is growing need in their communities and a desire for more food choices among clients. Most also believed that school districts and to a lesser degree healthcare clinics would play a growing role in hunger relief.
- There was not widespread agreement about resources that may be available from government programs or whether home delivery to clients will become more necessary.

Key Takeaways- Agency Capacity

- Overall agencies believe they are strongly positioned to meet the staffing and volunteer demands for their organizations. However, the majority of agencies providing service in non-Metro urban and suburban areas were concerned about their ability to retain volunteers.
- Agencies across our service area have a varied view of their financial outlook. A slight majority of agencies felt they would have larger budgets and would not have a loss in the number of individual donors. Despite this, the majority of agencies did indicate concern about a decline in their total amount of individual giving. These results varied based primarily on geography, but in some cases were also different by program type.
- Most respondents did not believe the amount of food they are wasting each week will continue to grow. Food shelves had the lowest rate of disagreement among program types, indicating there are some concerns about food waste among these programs.
- There was disagreement among respondents about changes in the amount of food donations that they would receive from grocery stores and retailers.
- Overall agencies indicate the need to make changes to meet the need in the community, indicating primarily that a low to moderate amount of change is necessary.

Respondent information

- 244 people responded to the survey
- One third of respondents provided services in rural areas, 24% Twin Cities suburbs, 21% TC urban areas, 6% non-Metro suburban and urban areas, and 15% serve multiple geographies.
- Food shelves were the program type best represented in the survey with 80% of respondents. Meal programs represented 12% and non-food programs were 8% of respondents.
- 23% of respondents were interested in participating further in the strategic planning process.

Agency Pulse Survey Results Detailed Results

Client Needs and Services

Question: I expect the number of hungry people in my community to grow.

86% of respondents say they somewhat agree or strongly agree that the number of hungry people in their communities will grow. 46% of agency partners somewhat agree with the number of hungry people in their communities will grow, while 40% of agency partners agreed with this statement.

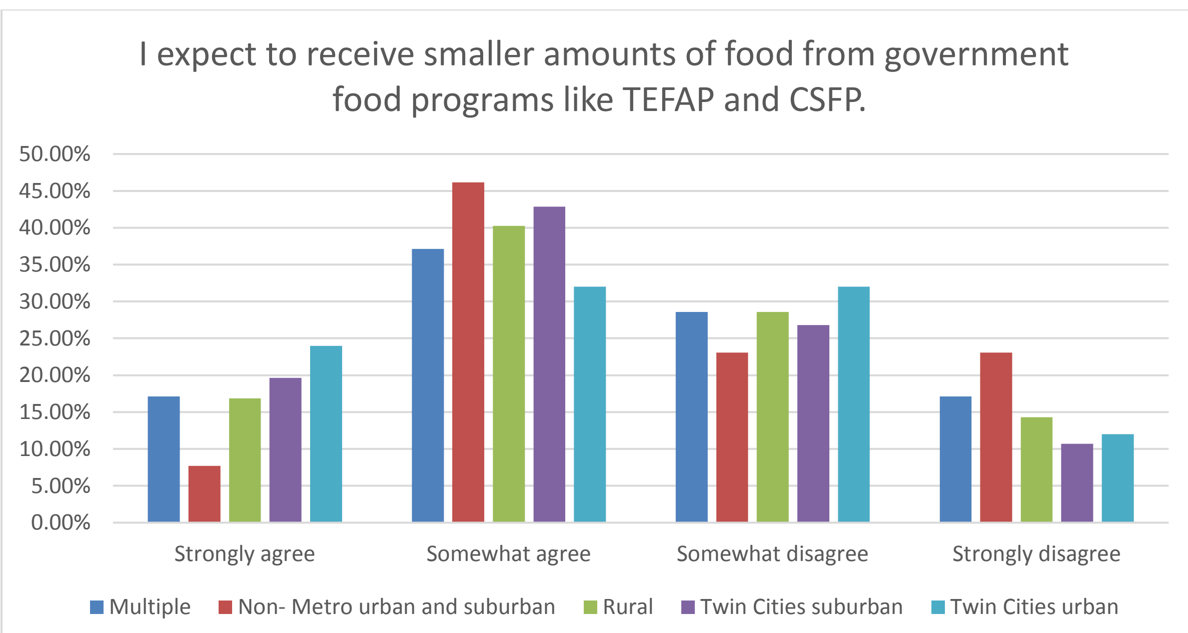
Question: I expect our clients will want more food choices than we currently provide.

78% of responding agency partners agree that clients will want more food choices than they currently provide. 39% of agency partners somewhat agreed with the above statement, while 40% of agency partners strongly agreed with the above statement. Among program types food shelves were most likely to somewhat disagree with this statement with 20% of respondents answering, "somewhat disagree."

Question: I expect to receive smaller amounts of food from government food programs like TEFAP and CSFP.

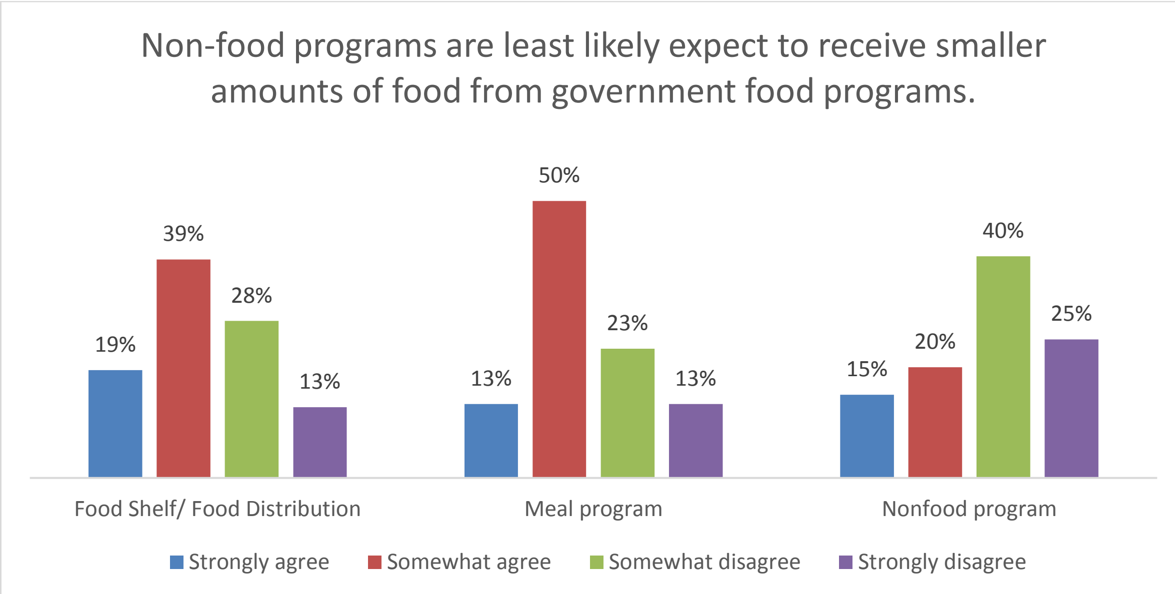
Agency partners were divided in their response. 57% of the responding agency partners somewhat (38%) or strongly (18%) agreed with the statement they would be receiving smaller amounts of food from government food programs like TEFAP and CSFP. While 43% of agency partners somewhat (28%) or strongly (14%) disagreed with the statement. 65% of non-food programs disagreed that they were likely to receive smaller amounts of food from government programs.

Graph 1: Changes in government food programs by geography



Notes: Not all responses total 100% due to rounding, not applicable and missing responses.
"Multiple" as a geographic designation indicates that agencies said they served clients in more than one geographic category, for example rural and Twin Cities suburban communities.

Graph 2: Changes in government food programs by program type



Question: I expect greater involvement of local health care clinics and hospitals in fighting hunger.

66% of respondents agreed (47% somewhat and 19% strongly) that local health care clinics and hospitals will have greater involvement in fighting hunger. Strong agreement was most common among urban agencies, of which 29% strongly agreed. Still 33% of the agency partners somewhat or strongly disagreed with greater involvement of local health care clinics and hospitals.

Question: I expect greater involvement of local schools and school districts in fighting hunger.

80% of respondents agreed with expecting greater involvement of local schools and school districts in fighting hunger. 48% of agency partners somewhat agreed with greater involvement of local schools and school districts in fighting hunger, while 31% strongly agreed with this statement.

Question: I expect our organization will have to deliver more food directly to people's homes.

50% of responding agency partners disagreed with expecting their organization having to deliver more food directly to people's homes, while 50% of other agency partners agreed with expecting their organization having to deliver more food directly to people's homes. This question was one with the most variety of answers among respondents related to client and client services. See Graphs 2 – 5 for more detail.

Graph 3: Overall response to the need to delivery more food directly to clients' homes

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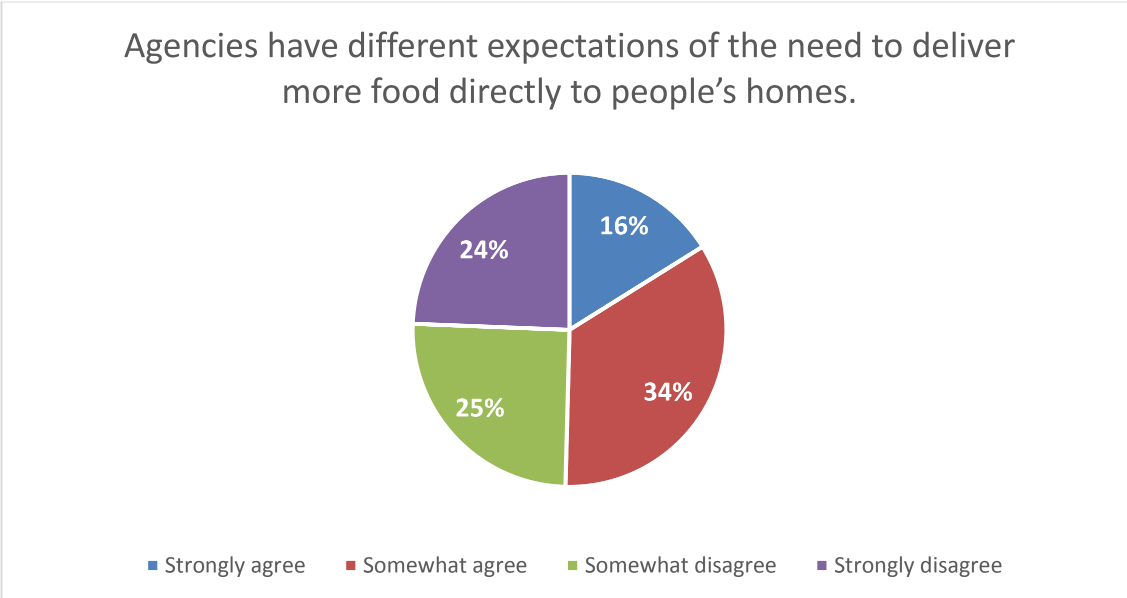
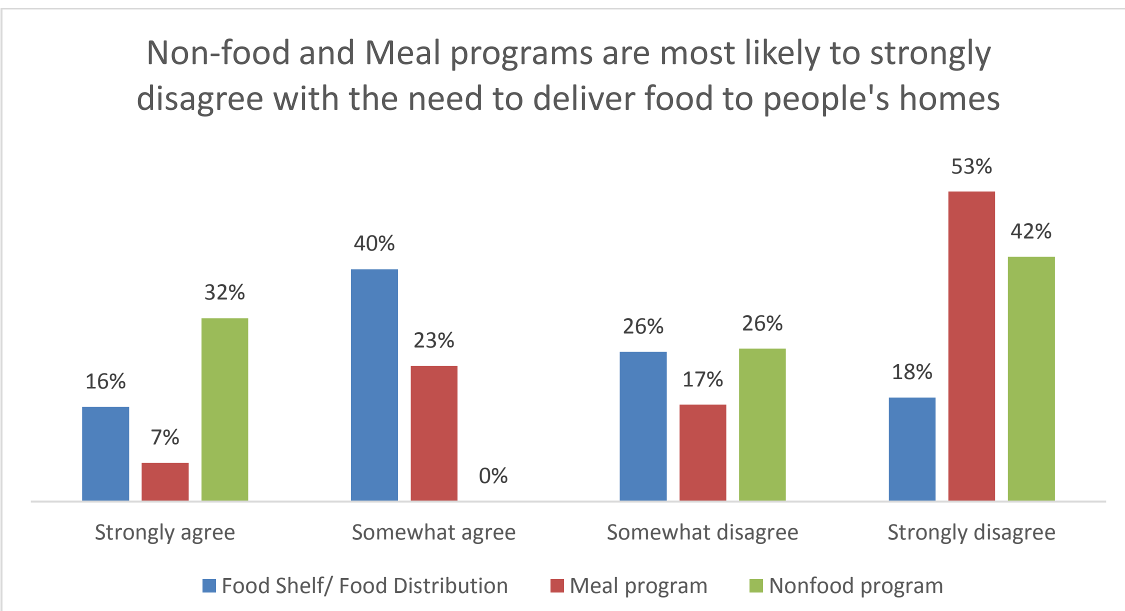


Graph 4: Response to the need to delivery more food directly to clients' homes by program type



Graph 5: Response to the need to delivery more food directly to clients' homes by geography

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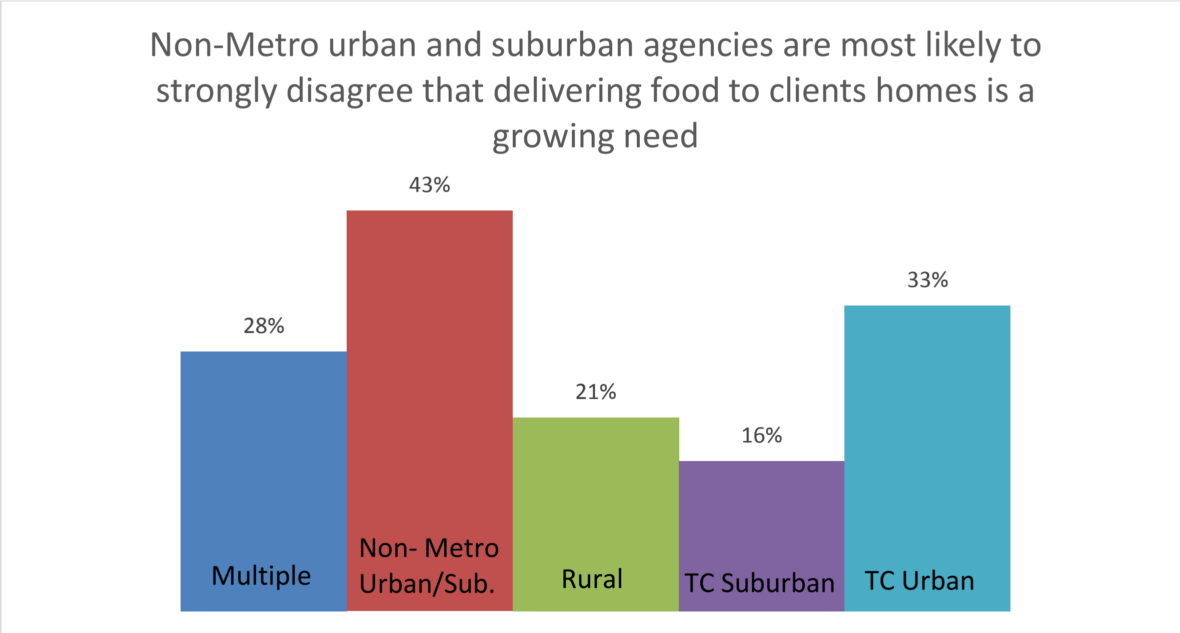

Agency Capacity

Question: I feel confident in our organization's capacity to attract and retain talented employees.

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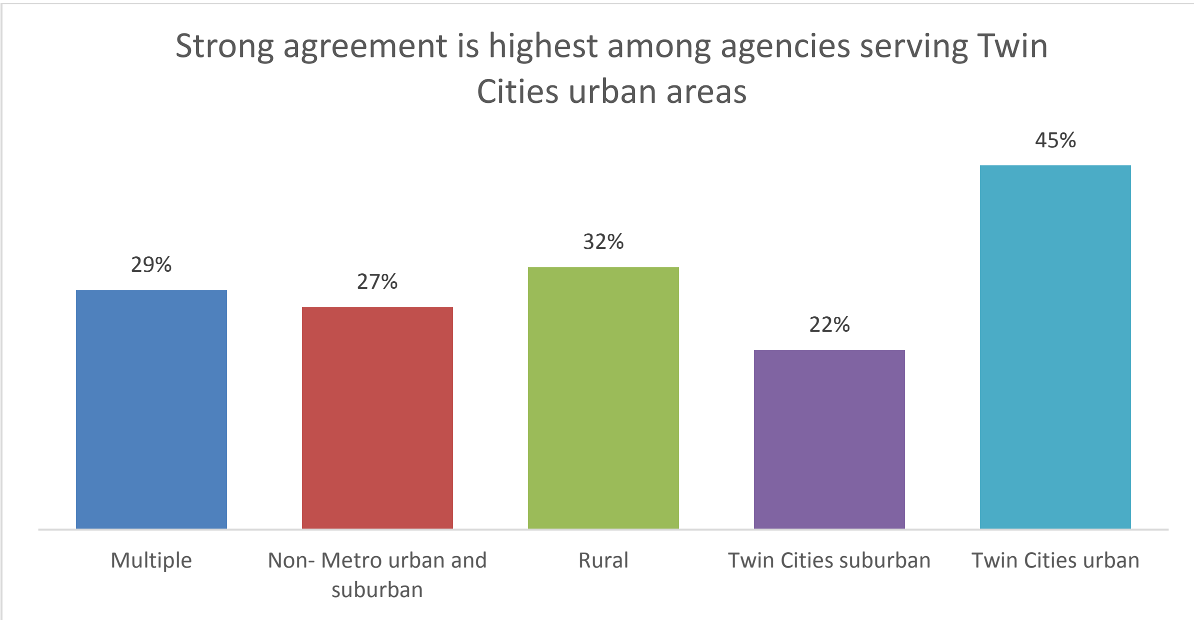
63% of responding agency partners either somewhat agreed or strongly agreed with their organization's capacity to attract and retain talented employees. 37% of agency partners somewhat agreed with the statement, while 26% of agency partners strongly agreed. 19% disagreed and 17% of respondents said this question was not applicable. Agencies serving the Twin Cities urban area were most likely to strongly agree with this statement with 45% in strong agreement, shown in Graph 6.

Graph 6: Strong agreement about ability to attract staff by geography



Question: I feel confident in our organization's capacity to recruit and retain enough committed volunteers to fulfill the needs of our operation.

73% of responding agency partners either somewhat agreed or strongly agreed with their organization's capacity to recruit and retain enough committed volunteers to fulfill the needs of their operation. 40% of agency partners somewhat agreed with the statement, while 32% of agency partners strongly agreed with the statement. Agencies providing service in non-Metro urban and suburban areas were the only geography to be more likely to disagree than agree with this statement, with 58% disagreeing.

Note: 20% of non-food programs (i.e. emergency shelters, tax prep, etc.) responded this question was not applicable.

Question: I believe our organization will grow and have a larger budget to work with.

42% of respondents somewhat (33%) or strongly (8%) disagreed with their organization growing and having a larger budget to work with. 57% of agency partners somewhat (43%) or strongly (13%) agreed with their organization growing and having a larger budget to work with. However, agencies

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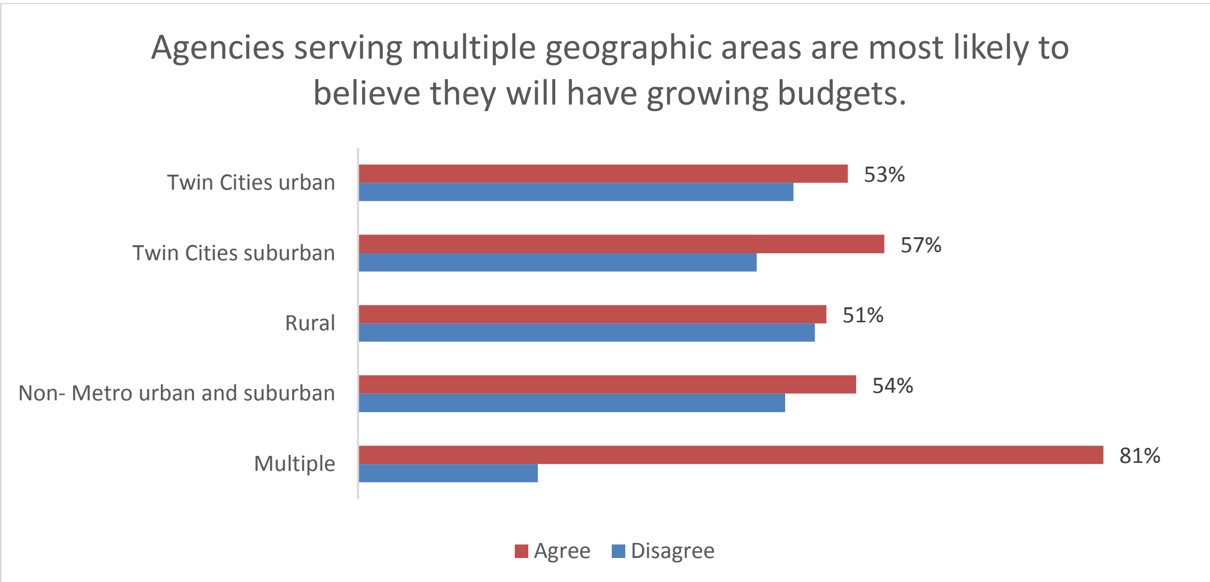
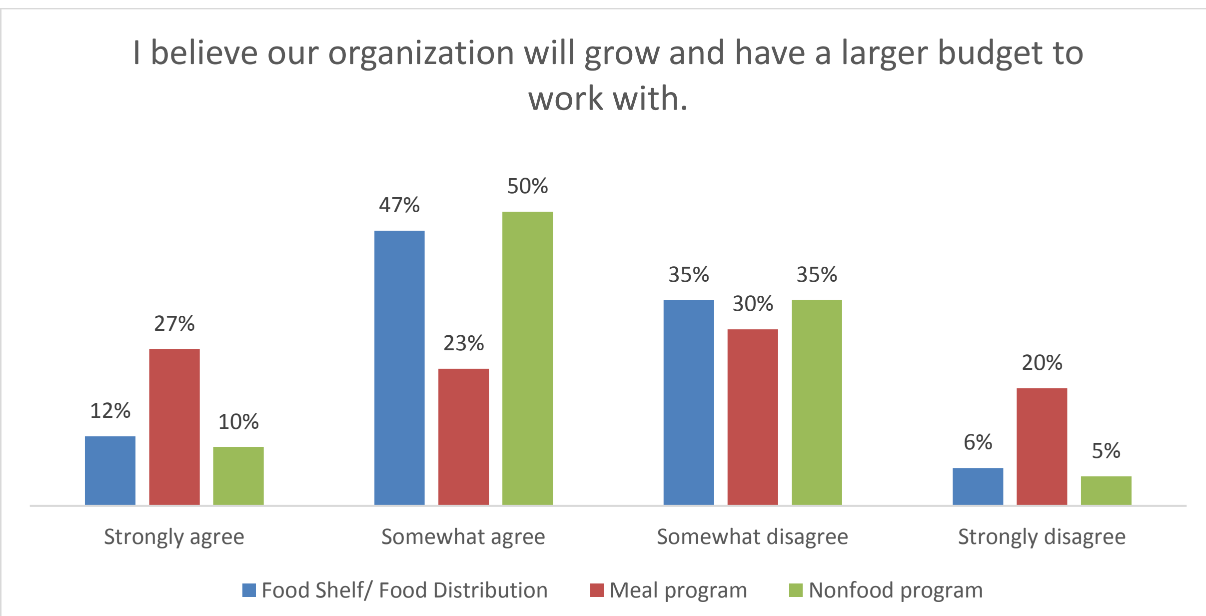
that serve programs in multiple geographic groups were more likely to agree that their organization and budget will grow, with 81% of respondents. See Graph 7 below for more detail. Meal programs were most evenly split in their response to this question, while both food shelves and non-food programs had nearly 50% of respondents agreeing somewhat, shown in Graph 8.

Graph 7: Agreement about budget growth based on geographic area



Graph 8: Agreement about budget growth by program type



Question: I am concerned about a decline in the total amount of giving from individual cash donors.

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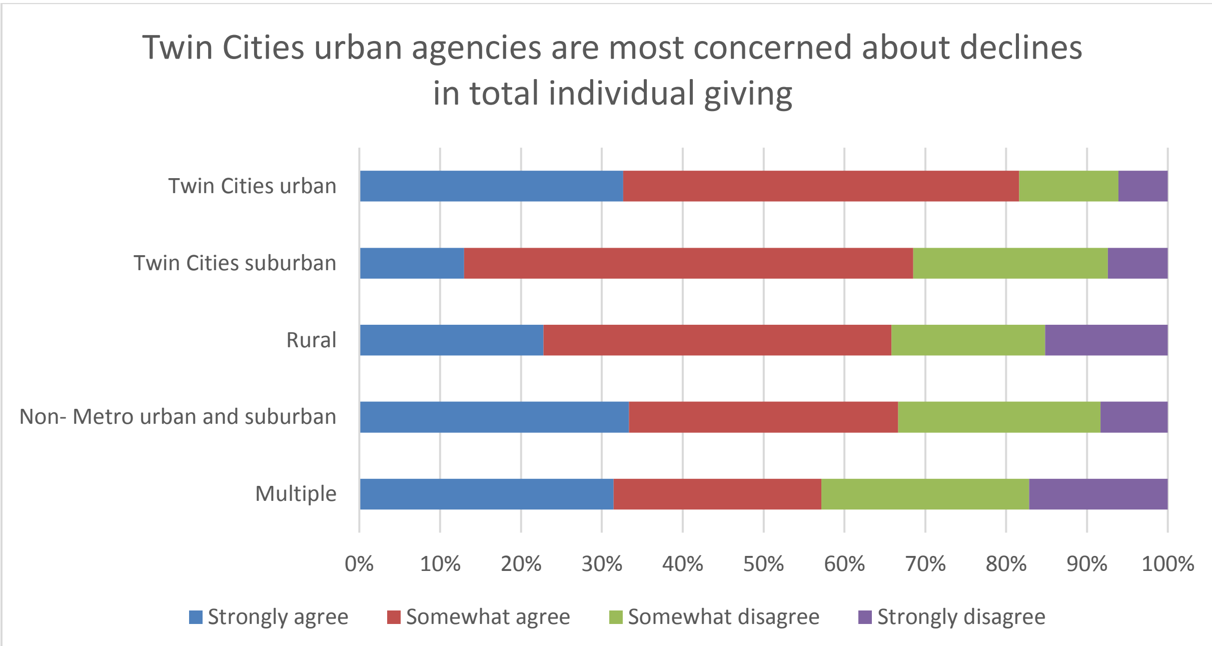
65% of respondents either somewhat agreed or strongly agreed about being concerned about a decline in their total amount of giving from individual cash donors. 42% of agency partners somewhat agreed with the statement, while 23% of agency partners strongly agreed. Agencies serving in Twin Cities urban areas are most concerned with 82% saying they are concerned about decline in total individual giving, as shown by Graph 9.

Graph 9: Concerns about total individual giving by geography



Question: I believe we will have fewer people donating to our organization.

56% of responding agency partners somewhat (41%) or strongly (15%) disagreed that fewer people will be donating to their organization, while 42% of agency partners somewhat (31%) or strongly (11%) agreed with the statement. Respondents from agencies serving people in the Twin Cities Urban area were the least optimistic with 56% saying they agreed with this statement, followed by non-Metro urban and suburban serving agencies.

Graph 10: Belief about the decrease in number of people donating to organization by geography

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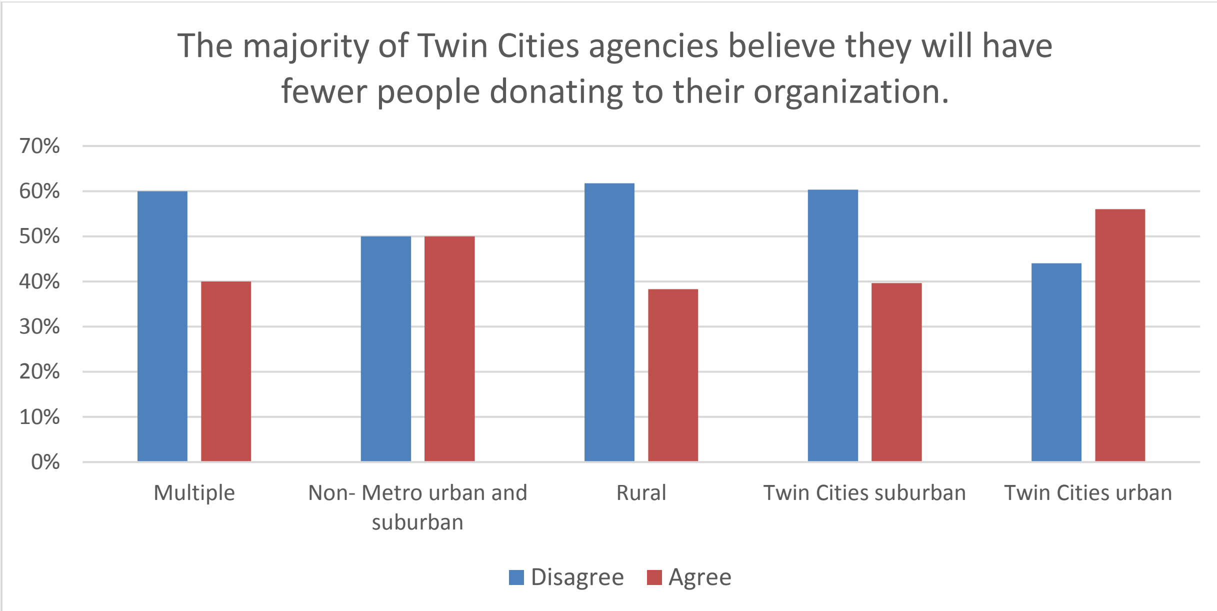

Question: I feel confident the amount of food donations we receive from local grocery and retail stores will increase.

Responses to this question were mixed with 43% of respondents disagreeing that they are confident the amount of food donations they receive from local grocery and retail stores will increase, while 46% agreed with the statement. Meal programs were most likely to strongly disagree, with 26% strong disagreement versus 8% and 5% for food shelves, and non-food programs respectfully.

Note: 11% of respondents said this question was not applicable to their agency.

Question: I am concerned that the amount of food we're wasting each week will continue to grow.

64% of responding agency partners either somewhat disagreed or strongly disagreed that the amount of food they are wasting each week will continue to grow. Agencies serving clients in the Twin Cities urban area had the most mixed response to this question with 55% disagreeing with the statement and 45% agreeing, see Graph 11. Food shelves had the lowest rate of disagreement among program types, indicating there are some concerns about food waste among these programs.

Graph 11: Concern about growing food waste by geography

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Question: What degree of change do you believe is required for your organization to meet its community hunger need?

57% of respondents believe that there is a moderate amount of change required for their organization to meet its community hunger need, while 29% of agency partners believe that there is a low amount of change required for their organization to meet its community hunger need. Agencies serving clients in multiple geographic areas were the most likely to indicate they need a high degree of change to meet needs. Food shelf programs, particularly in rural and Twin Cities suburban areas are more likely to say they need low to moderate change while food shelves serving multiple geographies and in non-Metro urban areas are more likely to indicate a need for high degree of change.

Graph 12: Degree of change needed to meet community hunger need by geography

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Feedback from Open-Ended Questions

Two open-ended questions were asked on this survey:

1) Are there any other significant trends or issues that Second Harvest Heartland should consider as we develop our 5-year strategic plan?
2) If you have any other input you would like to share about Second Harvest Heartland's strategic planning process, we welcome your feedback here.

Overall both of these questions were answered in a similar way, therefore the analysis is combined. A number of key themes were identified from the responses to these two questions. Some talked about issues that were already covered as part of the survey, while other brought new topics to light. A brief description of these themes follows.

Key themes

- **Growing number of seniors**- Many respondents addressed their concern for the growing number of hungry seniors in their communities. As a result, they are thinking about a higher demand for homebound and delivery services, and challenges for seniors to reach services. They also indicated a need for senior-friendly food including easily prepared meals. They state seniors have to choose between food and medicine and are concerned seniors wont access services due to pride. Alternatively, some agencies are concerned about the loss of volunteers at their organization, many of whom are seniors themselves.
- **Quality and quantity of fresh foods-** While many partners are excited about food rescue, retail partnerships, and fresh produce through SHH they also have concerns about these collaborations. The primary concerns were about the quality and the quantity of the product they are receiving. Some agencies have seen a decline in food rescue/retail donations which has limited what they can offer to customers. Primarily smaller agencies can't handle the large volume of food received. One suggestion was to allow small food shelves to share food rescue; another was to offer half pallets of produce for agencies to order. There were also concerns about the quality of produce coming from retailers and SHH orders. Many agencies said they had to throw away food, at a cost to them, because of moldy and rotten food.
- **An increasingly diverse clientele-** Agencies acknowledged our increasingly diverse communities with a variety of cultures, languages, and immigrant populations. Agencies wanted support for how to better meet their needs, identifying missed pockets of people, and meeting growing language needs. A small number of agencies also expressed concerns that clients are less likely to use services and are using services less as a result of Administration statements and actions.
- **Addressing systematic causes of hunger-** Respondents were interested in having SHH use its position and resources to learn more about the root causes of hunger and how addressing other issues can have a stabilizing impact on food need. A few areas noted were lack of affordable housing, low wage jobs, cutting SNAP and other government benefits, and systemic racism.

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- **Second Harvest's way of interacting-** Some respondents used question 2 to provide feedback about how SHH does its work and engages with the network. A primary focus on this type of feedback was the need for SHH to engage more with agency partners and on a level of partnership, not one of authority. We were suggested to remember agencies are our "primary customer" and allow them to provide input into the strategic planning process and other decision-making in person. We were asked to be more honest and transparent in our communication and in the development of mutually beneficial relationships. It was also recommended that we create a space for clients to be heard directly in policy discussions and strategic planning. Lastly, one respondent said we should focus on getting our basic services running at optimal level before we engage in more innovation.
- **Need for improved mobility and addressing lack of transportation-** Addressing growing concerns about accessibility of food resources was an issue brought up by a number of respondents. There is a concern that many people who need support don't have transportation available to get to existing resources, especially for seniors and in rural areas. The growing need for services such as mobile distributions and pop-up programs was acknowledged to address transportation limitations, however there was also concern about the financial sustainability and high cost of these services. Agencies want to see Second Harvest playing a larger role in addressing this issue and finding solutions along with agency partners.
- **Product availability-** Many respondents mentioned specific products that they would like to see made more available. The most common of these products was meat, followed closely by fresh produce and other healthier options. Other items include milk, eggs, individual serving items (for seniors and backpack programs), and more culturally specific foods. Items that meet an increasing number of special needs diets and foods that can be easily prepared like meal kits and tv dinners were also suggested.
- **Increased sector collaboration-** One frequently cited change agencies would like to see is increased collaboration, both between the organizations in the emergency food system and with other social service/community serving entities. A few examples given include retailers, farmers and urban growers, other food banks, and public health boards. Out of these collaborations agencies wanted best practices to be shared, information about employment and other support for clients, and nutrition education and demonstrations. One respondent suggested that Account Specialists be enabled to provide more capacity support, best practices, and other technical support. While most respondents were highly positive about increasing collaboration one respondent was concerned that SHH was inserting itself into partnerships that their agency had already created, which was not appreciated and undermined their existing efforts.
- **Ordering processes and fairness of distribution-** One segment of comments talked about challenges agencies have with our current ordering system. Several of these comments came from agencies ordering only monthly because of size or location and, therefore, they feel like they are missing out on highly desired products. Several respondents said that the 500lb minimum was hard to meet with storage limitations. One respondent requested a real-time

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ordering system, while more often people wanted changes to rules/processes in ordering to enable a more equitable distribution of high demand goods, meat in particular was frequently mentioned. One respondent expressed frustrations with differences in what was “available” for order and then what actually came in their deliveries. Lastly, several people mentioned that closing agency shopping was going to be detrimental for their organization.

- **Growing number of hungry neighbors and Increasing financial pressure -** Respondents are seeing a growing need for their services, but many are concerned about their ability to meet these growing needs. They mentioned increased labor and operations costs, concerns about loss of individual donations, reducing funding from state and county government, and dramatic reductions in United Way funding. One person also mentioned that as a result of the improved economy donors think there is less hunger in the community. Another respondent mentioned the large jump in demand during summers when kids aren’t in school.

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