Agency Pulse Survey Results

Oct - Nov 2018

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Food changes everything.™

Survey was conducted with Executive Directors and primary program contacts

- **Purpose:** Understand perspectives of agency partners on service and organizational trends from 2020-2025

- Respondents rated level of agreement or disagreement on a variety of statements

Strongly agree | Somewhat agree | Somewhat disagree | Strongly disagree

- Opportunity to identify additional trends or issues that weren't included in survey

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Survey had good response

- 244 respondents
- Respondents represented services provided in all geographic areas
  - 33% rural areas
  - 24% Twin Cities suburbs
  - 21% Twin Cities urban areas
  - 6% non-Metro suburban and urban areas
  - 15% serve multiple geographies
- Responses were received for all program types
  - 80% of respondents represented food shelves
  - 12% represented meal programs
  - 8% were non-food programs (ex. shelters)

Agencies overwhelmingly think the need will continue to grow

86% of respondents believe there will be more hungry people

https://catechistsjourney.loyolapress.com/2015/04/speaking-to-the-heart/diverse-group-of-people/

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AGENCIES IDENTIFIED AREAS OF CONFIDENCE…

Agencies are confident in their people power

73% are confident in their ability to recruit and retain enough committed volunteers to fulfill the needs of their operation

63% are confident in their ability to attract and retain talented employees

64% of respondents disagreed that the amount of food wasted each week will continue to grow

…AND AREAS WHERE WE CAN HELP SUPPORT THEIR EFFORTS TO MEET INCREASING NEED

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Almost 2/3rds of respondents are concerned individual donations will decrease, but some contradictions exist in responses

65% are concerned about decreased total individual cash donations

57% expect a larger overall budget

56% don’t expect a reduction in the number of people donating to their organizations

Number of donors vs decline in giving

- 40% thought they would have lower total individual giving and fewer people donating to their organization

- 28% thought they would have a decline in total individual giving, but did not think they would have fewer people donating

- 29% were not concerned about lower total individual giving or believed fewer people would donate

Note: Analysis only includes those who answered both questions with either an agree or disagree, not a not applicable or leaving one response blank.

We need to learn more from agency partners to understand these results

- It could be that some respondents anticipate larger donations from a smaller number of individuals or smaller donations for the same number of individuals
- Some may expect both their budget and number of donors to remain constant
- Could also expect funding from other sources to make up for lower levels of individual donations

Learning Opportunity: Agency visits in late winter will give us an opportunity to get more detailed information

78% of respondents agree that clients will want more food choices than they currently provide

Photo credit: http://www.anh-usa.org/microsite-subpage/about/

Supporting Agencies

Need to support agencies with the right volume of products

- 57% expect to receive smaller amounts of food from government food programs like TEFAP and CSFP

- 43% aren't confident the amount of food donations they receive from local grocery and retail stores will increase
  - 46% agreed are confident donations will increase

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Supporting Agencies

Provide the right variety and improved quality of product

- Even more availability of fresh food wanted, especially produce, meat, and healthy options
- Product isn’t always good quality resulting in increased work and cost for agencies
- Current systems and policies result in inequitable distribution of product among agencies

Learning Opportunity: Need to better understand the right mix of product variety needed to meet clients’ needs

Changes in clientele will have important implications for services

More seniors need support

- Diet appropriate food
- Easy to prepare meals
- Increase transportation options

More diversity

- Provide more culturally appropriate food
- Meet language needs
- Identify missed populations

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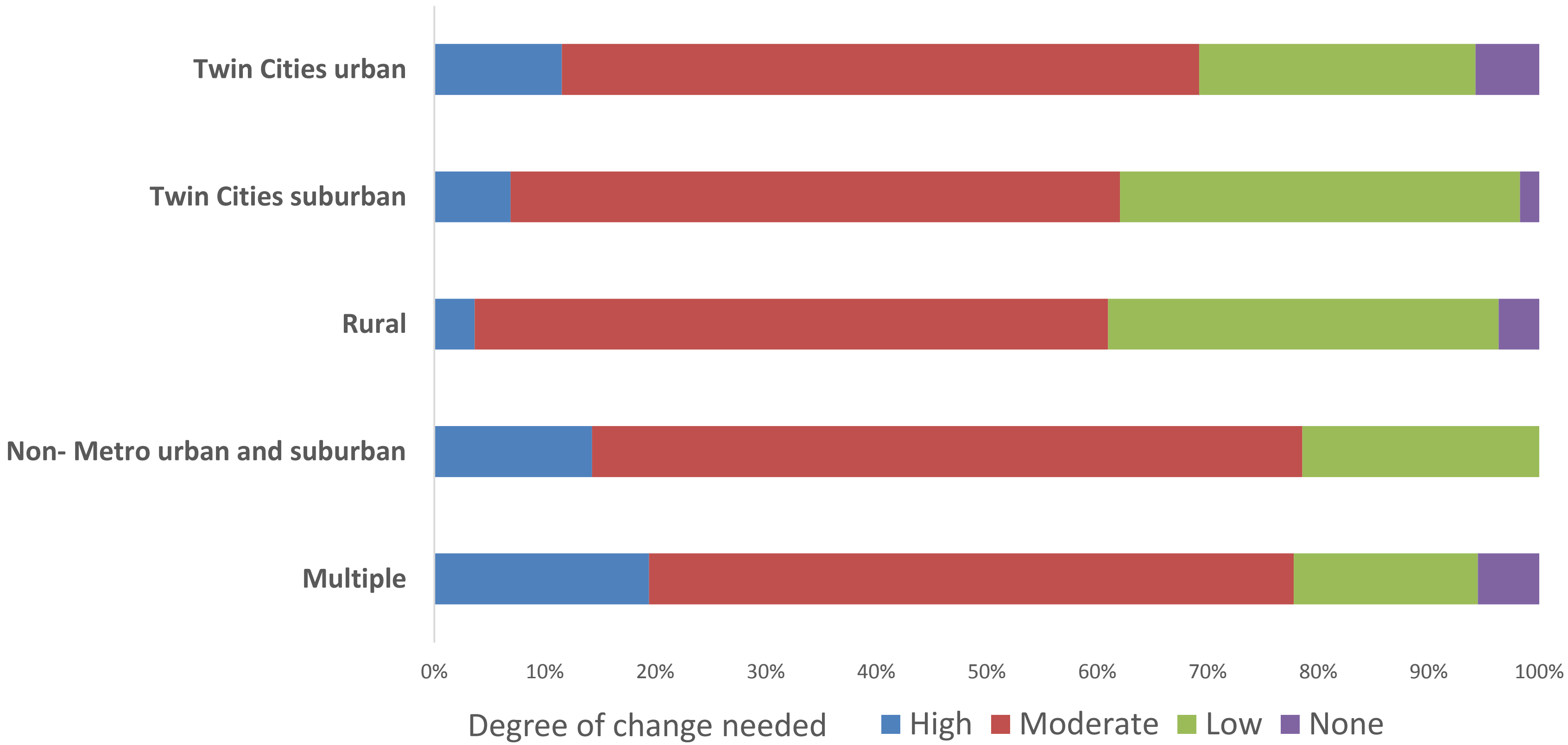
Photo credit: supermarketnews.com

50% expect to have to deliver more food directly to people's homes

- 56% of food shelves compared to 30% and 32% of meal programs and nonfood programs, respectively

Agencies recognize the need to make changes to meet community need



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Supporting Agencies

57% of agency partners believe there is a moderate amount of change required to meet need

However, **29%** believe they require a low amount of change and **4%** believe they require no change

Learning Opportunity: Learn more about what moderate change means to agencies and how we can understand motivations in those indicating low or no need for organizational change

More collaboration is desired to the meet the need and should be inclusive of more sectors

- 80% of respondents expect greater involvement of local schools and school districts in fighting hunger
- 66% think local health care clinics and hospitals will grow in hunger relief efforts
- Desire to see increased collaboration within the network and with other community organizations
- Focus on new collaborations that add value to partners and recognize existing community collaborations

Respondents want to see Second Harvest address systematic causes of hunger

Leverage our resources and visibility to learn more about root causes of hunger

"Housing costs and low wages are significant causes of need for food assistance. Would be helpful to understand the degree of those causes and how impactful food assistance is in stabilizing families' budgets."