

GROCER EASE PROGRAM REVIEW AND EVALUATION

March 2015

Grocer Ease is a program of:



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United Way Funded Agency

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ACKNOWLEDGEMENTS

We wish to acknowledge the following individuals and organizations for their valuable contributions to this review process:

- Grocer Ease shoppers and Banyan staff members
- Rachel Hill, McMaster University Placement Student
- Erin Walters, Volunteer
- Community partners and program participants who gave valuable input
- Don Jaffray, Executive Director, SPRC

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EXECUTIVE SUMMARY

Community members accessing the Grocer Ease service report a high level of satisfaction with the program, but the program also faces many challenges. The purpose of this review is to determine what resources and structure Grocer Ease requires to ensure that it meets the needs of the community, the mandate of its funders, and supports the mission of Banyan Community Services. With an increasingly aging population (the primary population who accesses Grocer Ease), services that support seniors in remaining in their homes when other abilities supporting independence may diminish are of increasing importance. At the same time, a range of community services face increasing financial pressures, and so sustaining and enhancing them is a persistent challenge.

Data collection methods for the review included a review of several comparable programs across Canada, telephone surveys with 70 program participants and 6 of their family members, a focus group and interviews with staff (9 staff members in total), and semi-structured conversations with 6 community partners.

The review showed that participants are extremely satisfied with the program; they felt that it meets their needs, and most would recommend the program to others. However, as the program has been in the process of formalizing, staff members have at times felt under-supported. Challenges around communication, documentation, emergency procedures, program accreditation, and funder requirements, among several others, are explored.

The review proposes the creation of a program coordinator position and the creation of lead shopper roles to provide necessary support during business hours. The review also recommends that several policies be reviewed, clarified, or created, and a number of recommendations are aimed at improving staff communication and dynamics.

1.0 INTRODUCTION AND METHODS

1.1 Introduction

Grocer Ease is a program of Banyan Community Services that has been providing grocery shopping services to community members who are unable to shop independently for over 25 years. The target population for the service is adults (18 years of age or older) who are either physically, mentally challenged, or part of hospital discharge planning and require home support to reside independently within their home environment, and seniors (65 years of age or older) who require home care support to reside independently within their home environment.

To be eligible for service from Banyan's Grocer Ease program persons must meet at least one of the following criteria:

- Be physically and/or mentally unable to obtain their own groceries.
- Be registered with D.A.R.T.S.
- Be recommended through an agency or doctor as having a "need for service".
- Be a primary caregiver.
- Be receiving a disability pension.

The program currently has a client list of 168 individuals who access the service with varying frequency; some participants access the service weekly, others access it a few times in a year, and still others use it only temporarily or seasonally when weather conditions can further limit mobility.

The majority of funding (67%) for Grocer Ease comes from the Ministry of Health and Long Term Care and is administered by the Hamilton, Niagara, Haldimand, Brant LHIN (Local Health Integration Network). The remainder of the program budget is supported by fees for service from participants, donations, City of Hamilton funding, a percentage rebate on the use of grocery store gift cards, and other funding sources.

Grocer Ease has experienced significant changes in the last several years, including leadership changes, Grocer Ease home office relocations, Grocer Ease staff changes, and changes in documentation practices.

In this context Banyan Community Services has engaged the Social Planning and Research Council of Hamilton (SPRC) to conduct a program review and evaluation of the Grocer Ease program. The review's objectives are presented below.

1.2 Objectives

The objective of this review and evaluation is to answer the primary question: What resources and structure does Grocer Ease require to ensure that it meets the mandate of its funders and supports the mission of Banyan Community Services? Banyan's mission is as follows:

Banyan Community Services delivers services and programs designed to help disadvantaged or at risk members of our community learn new skills, attitudes, and behaviors to help them build a better future

As part of answering the primary question, this review and evaluation is also sub-divided into the following sub-questions:

Evaluation Questions

1. Is the target population being reached?
2. Are the roles of the staff clearly understood?
3. Does the Grocer Ease program meet the needs of the clients?

Review/Program Development Questions

4. Does Grocer Ease work effectively with community partners?
5. How should the Grocer Ease program be implemented in order to support its mandate while simultaneously controlling costs?
6. What is the appropriate structure to maintain the Grocer Ease program?

1.3 Methods

The following data collection methods were used in this review and evaluation:

- Review of program documents and data (sub-questions 1, 5)
 - Included documents for clients, job descriptions, internal administrative documents, budget, funding agreements, and others
- Key informant interview with Director of Program Development (background and context)
- Program Shopper focus group, held on January 9, 2015, with 8 participants (sub-questions 2, 6)
- Client telephone surveys (sub-questions 3, 5)
 - 70 individuals responded from a sample of 134 potential respondents (from a list of 184 active clients, represents response rate of 52%)
- Telephone interviews with 6 family members or caregivers of clients (sub-questions 3, 5)
- Semi-structured conversations with 6 community partners, including those not connected with the program (sub-questions 4, 6)
- Review of comparable programs (sub-questions 5, 6)
- Quantitative and qualitative analysis of data from the above methods (sub-questions 5, 6)

Concerns arose for some participant survey respondents when researchers inquired about family members or caregivers who might be willing to speak with the researchers. The goal for this question was to speak with others who may be part of supporting a program participant about how the Grocer Ease service impacts them: for example, the use of Grocer Ease may allow a family member or caregiver to direct their time to visiting or supporting a participant in other ways. This goal should have been communicated clearly to respondents and often was not. We acknowledge that research can be intrusive and that potential vulnerability among

stakeholders should be considered carefully prior to consultation. Further, we strive to use good consultation practices such as pilot testing consultation questions with stakeholders and others in direct contact with stakeholder groups prior to consultation.

2.0 FINDINGS, DISCUSSION, AND RECOMMENDATIONS

1.12.1 Comparable programs

Several not-for-profit organizations across Canada provide grocery shopping and delivery services for adults who have difficulties obtaining their own groceries. While these programs have similar objectives as Grocer Ease, they vary in terms of how services are delivered, the extent of services provided, and cost.

While the programs follow the same general process (clients register for the service and upon meeting eligibility requirements, place grocery orders over the telephone to be delivered in the near future), there are differences in the details of how services are provided. For instance for some programs, such as those provided by Flamborough Information and Community Services and Golden Circle Senior Resource Centre (Red Deer, AB), representatives from the organization call the clients on a specific day each week to obtain a grocery list rather than the clients calling in when they require groceries. The Better Living program also allows individuals to place orders online in addition to over the phone.

In comparison to Grocer Ease, some programs have additional restrictions on the services provided. Programs provided by Golden Circle Senior Resource Centre and Senior Outreach Society (Kamloops, BC) have specific requirements on which day of the week the groceries are delivered, rather than providing the deliveries within 24 hours of order regardless of the time of week. Some programs, such as those provided by Better Living (Toronto, ON) and Golden Circle Senior Resource Centre, also place restrictions on which stores are used, as they have developed relationships with specific retailers to provide additional discounts. For example, an exclusive collaboration between Better Living and Longo's allows their clients to receive Longo's Grocery Gateway service for a flat rate of \$3 per delivery instead of \$9.99 plus tax.

In addition to the specifics of program delivery, a significant difference between Grocer Ease and comparable programs is who actually provides the services. In other programs volunteers are responsible for shopping and delivering the goods, whereas part-time paid staff members fulfill these duties in the Grocer Ease program. It was not clear from information available online how these programs handle the logistics of cash and payment between participants, volunteers, and the program, though this could be explored by Grocer Ease if the program would like to consider using volunteers as part of its work.

All programs collect personalized grocery lists then purchase, deliver, and put away all goods for their clients, but some programs provide additional services. For instance, the programs provided by Senior Outreach Society and Better Living provide additional support in-person and over the phone to ensure their clients are meeting nutritional requirements and abiding by their dietary restrictions. Better Living also makes volunteers available to support clients in setting up orders online or by phone, meal planning, and shopping on a budget.

Programs also vary in terms of cost. Comparable programs all charge less than Grocer Ease's \$9 fee, ranging from free-of-cost at the Senior Outreach Society to \$5 per delivery at the Golden Circle Senior Resource Centre. All of the comparison programs charge flat rates for service, unlike Grocer Ease, which charges an additional \$2.50 for every \$25.00 spent over the threshold of \$100.00. One other program, offered by Better Living, has a cost restriction, requiring a minimum of \$45.00 be spent per order.

Recommendations:

- Consider increasing the methods by which participants may place orders (ie. Taking grocery lists online or over the phone, establishing weekly calls to interested participants from office or shopper staff).
- Consider developing partnerships with retailers (such as Grocery Gateway) for participants who do not require assistance putting groceries away and have other supports.
- Interview representatives from programs discussed above about how financial logistics are managed with volunteers. (See Appendix A for a list of programs examined and their websites.)
- Consult with participants about whether (and how) to offer support to participants around nutritional requirements and meeting dietary restrictions.

2.2 Program participant satisfaction

Grocer Ease participants were extremely positive in their assessments of the service and the manner in which they are treated by staff. Over 98% of participants surveyed indicated that the quality of service they received was good or excellent, that the program met their needs, that staff treated them in a polite and respectful manner, and that they would recommend the program to others. See Appendix C for full program participant survey results.

Many participants were not aware of the complaints procedure or whether or how a complaint might influence their involvement in the program, though the vast majority had no complaints.

Unfortunately all data from previous satisfaction surveys was lost, making comparisons with previous levels of satisfaction impossible.

Recommendations:

- Establish a new data collection system (e.g. using Excel) for ongoing service quality monitoring. Telephone surveys are most expedient. These could be completed by shoppers or by a third party.
- Highlight information about the complaints procedure and other operational rules (such as when orders for Mondays should be placed) in written materials and in verbal explanations of the service.

- Consider expanding capacity to offer Friday deliveries to meet client demand.
- Increase times during which participants can call to place orders.
- Consider advertising or promoting the program beyond current practices.
- Establish consistent practices around participant messages for shoppers.

2.3 Workload distribution

Shops are occasionally redistributed from one shopper to another based on the geographic areas that shoppers are designated to serve, which in some cases leads to some shoppers have fairly heavy workloads while others are more available. This practice was frustrating for some shoppers.

Recommendations:

- Principles guiding workload distribution should be shared with shoppers, or developed if not already in place. Redistribution of shops and reasons supporting these should be communicated transparently with shoppers involved.
- Support staff in supporting participants through transition when shoppers are re-assigned. Communicate considerately that participants are served by the program as a whole and that particular shoppers cannot be guaranteed to be carrying out an individual participant's shop.

2.4 Communication

A variety of communication methods and practices are currently being used in the program, including personal email, Banyan email, personal cell phones, home phones, and courtesy phones located in grocery stores. Not all shoppers have access to personal computers or email, making consistent and timely communication with all staff challenging.

At the time of consultation, several shoppers used personal email addresses for Grocer Ease work while others used Banyan email addresses. Internal documents note that shoppers will not be permitted to use personal email addresses for work purposes after February 2015. In keeping with professional practice, use of Banyan email addresses is preferable as it supports appropriate professional boundaries between shoppers and participants, helps to maintain client confidentiality, and may help to delineate when staff are working billable hours. Email to all Banyan staff this is the main source of organization-wide information, but there is no requirement that shoppers read organizational emails that are not related to Grocer Ease. Monitoring and/or responding to Banyan emails that are not directly about Grocer Ease are at shoppers' discretion given time constraints.

Monthly staff meetings, for which staff members are paid, were established during the course of this review (in December 2014).

Cell phone use is discussed in a separate section below.

Recommendations:

- Develop a clear and transparent practice around communication with staff in writing and circulate to ensure that all staff members receive necessary information in a consistent and timely manner.
- Staff should access technical support through Banyan as needed to facilitate to use of Banyan email address, or to transition away from email altogether.
- Continue to hold monthly staff meetings to strengthen clear communication and productive working relationships between staff members. As required by law, staff should continue to be paid for this time.

2.5 Cell phone use

Some Shoppers use personal cell phones to call participants from stores for various reasons, such as to clarify participant preference around substitutions. Current policy is that shoppers should charge \$0.50 per call to the client. Some shoppers use courtesy phones available in the stores, which was suggested as an alternative to use of personal cell phones. There was a concern among some shoppers that costs they incurred from cell phone use for work purposes, including calling the office or responding to work email, exceeded this amount.

Although there is no requirement from the program that shoppers use personal cell phones for work, there are advantages to be gained from this practice: it can be an important part of maintaining high participant satisfaction by clarifying preferences and reducing returns, and issues that arise while shoppers are out shopping may be resolved more quickly between office staff and shoppers.

Recommendations:

- Review cell phone use practices and consider encouraging use of courtesy phones in stores.
- Review call reimbursement policy and encourage shoppers to charge clients for call costs as outlined in current policy.
- Revisit the current reimbursement policy for calls to clients and consider adjusting it to more closely reflect costs.
- Consider making cell phones mandatory for all shoppers (or future hires) and making a per-shop or per-unit reimbursement available to shoppers for associated costs.

2.6 Documentation

Completing required documentation for the program emerged as another challenge. For example, some documentation is submitted with portions incomplete. New documentation processes introduced roughly one year prior to this review have also increased the time needed to complete regular documentation without sufficient billable hours being approved for the task. More recently three reports – for mileage, pay, and reporting on the details of each shop – have been combined into one form that is due bi-monthly. Some reporting can be completed electronically, although use of this capacity seems limited.

Recommendations:

- Offer training in completing required documents, both in hard copy and online.
- Offer InterRAI and intake process training for additional staff members.
- Develop a formula for calculating billable hours for completing documentation that is proportional to the number of shops completed per week by each shopper. (See section 2.7 below.) Discuss among program staff the amount of time required to complete required documentation as part of this.

2.7 Compensation

The 2009 shoppers' manual (the most recent complete version on record) states that shoppers "are paid staff, but also contribute many volunteer hours to the program." This practice, which contravenes labour laws, has been officially ended. However, two issues around compensated time for shoppers remain; specifically, time spent completing reports and required documentation, and time making trips to the office to drop documentation off.

Currently shoppers are entitled to bill for one unit/hour of time per week to complete paperwork such as deposit slips and a bi-monthly report covering hours worked, shopping details, and mileage for reimbursement. This review showed that some shoppers find the hour allotted for documentation weekly insufficient for this task.

Shopping routes are organized to be as much in a loop configuration as possible and shoppers are encouraged to drop paperwork off at the office when routes pass nearby the office.

At times routes do not pass nearby the office, though, and documentation must be delivered via a separate trip or through other means. When separate trips to the office are required, mileage may be claimed for reimbursement. Shoppers are not paid hours for the duration of such trips. As a means of making submitting required documentation easier, shoppers can submit deposit slips and client transaction records in person during monthly staff meetings, or when shoppers are in the office at other times for other purposes (e.g. picking up gift cards). Combined payroll, mileage, and shopping detail reports, due bi-weekly, can be faxed, emailed, or mailed in to the

office. The organization has indicated a willingness to provide postage paid envelopes to facilitate this process.

Pay equity was another concern that emerged through the focus group. Computer use, including email and Excel has increased among staff members over time. While not formally required for the job, these skills offer ease of access for completing various job tasks, including documentation and communicating with other staff members. In light of this, there was concern that compensation for the position may not be reflective of current average rates for the average skill level used.

Recommendations:

- Review the amount of time shoppers should bill for completing documentation, considering the average amount of time spent by shoppers completing weekly documentation. Adjust the time shoppers may bill for this duty to accurately reflect hours worked.
- Establish and circulate clear policies about duties for which shoppers are to be compensated, including time for separate trips to the office to deliver documents.
- Revisit documentation delivery procedures and consider establishing a mailing process.
- Review required skills, including computer skills, and pay equity for the position of shopper.
- Revisit the office-wide pay equity plan and job requirements to ensure broad understanding.

2.8 Emergency procedure

The focus group with shoppers revealed a lack of clarity around the program's emergency procedures since the departure of staff members formerly based at the Grocer Ease/Banyan office. Previous procedure included calling staff members who are no longer with the program. At present office support in case of emergency or serious incident is available to shoppers during business hours. The organization's position is that shopping must only occur during day time business hours, as on-call support for emergencies is not available outside of these hours.

Recommendations:

- Develop (or review if already in place) comprehensive emergency procedures for situations staff may encounter through the course of their typical work duties.
- Revisit and potentially modify manual to clarify emergency procedures.
- Train all staff on emergency procedures as soon as possible.
- Update the Shoppers' manual to include any change to emergency procedures.

2.9 Health and safety training

Banyan has a Health and Safety program that is operationalized differently at its various programs and sites depending on context. While shoppers are briefed about health and safety concerns they may face in the course of their work in the community at the time of hiring, this may not adequately inform staff members of rights and responsibilities around health and safety legislation.

Recommendation:

- All Grocer Ease staff members receive at least annual health and safety training. This training must be mandatory, staff must be compensated for attending, and knowledge of policies and practices should be evaluated regularly.
- Review the features of the current health and safety program at Banyan with all Grocer Ease staff.
- Consider developing a Grocer Ease Health and Safety committee.

2.10 Other staff training

Job skills used by shoppers have changed over time, with increased use of computer and other technology skills (e.g. Excel, synching handheld devices), use of documents, and record keeping.

Recommendation:

- Offer regular training on various job-related skills such as Excel, synching handheld devices, use of documents, and record keeping practices.

2.11 Staff dynamics

Shoppers identified frustration about communication between themselves and management, particularly with regard to staffing and program structure changes. Several staffing changes occurred during the course of 2014 as part of a transition to a model for the program that meets the needs of the organization, the community, and funders. These staffing decisions were not permanent as the program was beginning to undergo this review, which aims to recommend a model to meet the needs described above. In this transition period shoppers expressed feelings of being inadequately supported in their roles, particularly in relation to a lack of clarity around emergency protocol, lack of clarity around communication processes, and tension and conflict in the workplace.

A strength across all staff consulted as part of this review was a commitment to the success of the program and care for participants.

Recommendations:

- Ensure that communications about program and staffing changes are transparent and give staff as much notice as possible.
- Hold a third-party-facilitated discussion between all Grocer Ease staff and management to identify and address areas of concern and build mutual understanding.
- Consider delivering Non-Violent Communication training to all program staff and staff who interact with program staff to promote respectful workplace communication.
- Require new staff (i.e. the proposed new coordinator position described in section 2.17) to shadow a shopper on a shop to promote greater staff team understanding.

2.12 Client list maintenance and eligibility

Currently no process is in place to ensure continued participant eligibility for the program. Some participants' circumstances are not likely to change such that they would alter eligibility; for others, such as participants recently discharged from hospital or requirements for seasonal service only, need for the service may be time-limited. In order to effectively serve the greatest number of community members who will benefit most from the program, the client list and eligibility should be reviewed and maintained on an ongoing basis.

The program does have an electronic database that tracks time-limited eligibility, but the software is not compatible with Windows, and client information in the database has not been maintained, undermining the reliability and usability of the data.

Recommendations:

- Carry out the planned re-administration of intakes. Develop clear written and oral communication materials to inform program participants of the reasons for the re-assessments. Plan for additional staff time to administer the intakes and to respond to potential participant questions about the process.
- Replace the current database with windows-compatible software, such as Microsoft Access or another program. Ensure that information about time-limited eligibility is included in order to limit the need for future re-administration of the intake process.

2.13 Accreditation

This review also explored pros and cons of pursuing accreditation with the Ontario Community Supports Association (OCSA). Such accreditation offers some benefits to member services such as a collective voice in policy debates and communication between like-agencies. However, this review has revealed that this accreditation is not required in order to receive referrals from CCAC or other partners. CCAC will refer to any service that receives funding from the LHIN. Thus, CCAC would simply need to be notified of Grocer Ease's willingness in order to resume making referrals to the program.

Recommendation:

- Do not pursue OCSA accreditation in the short term in order to contain program costs.

2.14 Funder requirements

As indicated earlier in this document the primary funder of the Grocer Ease program is the Ministry of Health and Long Term Care. The funding agreement is administered by the Hamilton, Niagara, Haldimand, Brant LHIN. This agreement entails organizational policies, practises, and processes that are significantly different from Banyan's other funding relationships.

This model is challenging for Banyan as Grocer Ease is but one of several programs it operates, whose budget represents roughly 2.5% of Banyan's overall budget. The LHIN is a minority funder for the organization, which raises questions about how to comply with competing requirements from funders of Banyan's range of programs. This review showed that no exceptions to the funding agreement are possible.

Recommendations:

- This significant issue should be discussed with the LHIN in the near future.
- Banyan may wish to pursue finding another organization to operate the program because of these requirements. The program might be a better fit with an organization already funded by the LHIN or otherwise providing health care services more directly, such that requirements would not pose problems.
- Alternatively, the program may be served by being housed in an organization that fundraises actively and regularly as part of its ongoing work; indeed, Grocer Ease may be a draw for donors.

2.15 Resource development

The primary funder (LHIN) currently funds the program at a rate below the full program budget, thereby requiring fundraising on Banyan's part. Current fundraising is limited to a small rebate earned as a percentage of monies spent on grocery store gift cards. The result of this budget shortfall is that Banyan contributes roughly \$20,000 annually to support the program. As noted in previous reviews, this is not sustainable.

Recommendations:

- Expand fundraising (e.g. seeking out further institutional funding or private donors) activities to make up the annual budget shortfall. Fundraising could be contracted out to professionals rather than current staff taking on the work.

- Alternatively, Banyan may wish to explore the possibility of another organization that may be able to meet the requirements and have more fundraising infrastructure taking on the Grocer Ease program.

2.16 Partnerships

Awareness

Awareness of Grocer Ease among community partners was varied, with some seeing Grocer Ease as being well known in the community and making regular referrals to the program, and others having limited or no knowledge of the program and wanting to learn more about the area the program serves, screening of staff, eligibility requirements and fee structure.

Referrals

Reduced referrals from CCAC to Grocer Ease in the last few years is likely rooted in communication from Grocer Ease that the program had a waitlist and that service providers should not make referrals to it. CCAC also indicated that they could house an electronically fillable referral form on the CCAC website to make referrals smoother.

One partner consulted reported that their staff would make referrals if families were looking only for grocery shopping services, but indicated that personal support workers from the organization typically shop for clients' groceries as part of their services, limiting referrals to Grocer Ease at present.

Partner consultations generated various strategies for increasing referrals to Grocer Ease, listed in the recommendations below.

Affordability

Several partners affirmed that there is a need for low-cost grocery services in the community, and suggested that the fee charged by Grocer Ease was not a barrier for most participants.

Recommendations:

- Contact CCAC and ask them to begin referring clients to Grocer Ease again. Provide CCAC with referral forms if possible.
- Share up-to-date information regarding the area the program serves, staff screening practices, eligibility requirements, and fee structure with partners who may be able to provide referrals. This may be accomplished most effectively through individual conversations or meetings with partners and providing more detailed program information than is currently included in program pamphlets.

- Reach out to partner organizations to reach agreements to distribute each other's promotional materials (e.g. pamphlets).
- Advertise in subsidized seniors' apartment buildings (if not already happening).
- Connect with the Shopping by Bus program, operating out of the VON (Victorian Order of Nurses). As participants' capacity to grocery shop with volunteer support may diminish, some may benefit from being connected to Grocer Ease.
- In order for the program to be connected to a system of services, consider connecting with the Hamilton Council on Aging and/or implementation committees of Hamilton's Age-Friendly City Plan (2014).
- Continue to minimize costs to participants.

2.17 Program structure

Based on the issues considered above, this review recommends the following structure for the Grocer Ease program.

Recommendations:

- Instead of having a separate Office Manager and Program Manager, this review recommends creating the position of a **Program Coordinator** who would be available in the office during business hours to receive calls from participants and support shoppers by phone or in person as needed. The coordinator would also spend a portion of their time in the early weeks of the position going out into the community to strengthen connections to potentially referring partners.
- Consider establishing a system of **Lead Shoppers** to be available to support fellow shoppers as issues may arise during the working day, and to act as back-up emergency contacts. Increased responsibilities as a Lead Shopper should be reflected in compensation.
- Develop a strategy to connect with partners and increase referrals. The program should be prepared for increased referrals in terms of staff capacity and costs if promotion activities are undertaken. As part of the strategy, develop a document with a detailed program description, including a Frequently Asked Question-style section to share with partners.
- Explore partnerships with suppliers to see if discounts are available. If partnerships are established, they should be implemented only with new participants to minimize service disruption for participants. Alternatively, participants could opt-in or out of such store limitations given the incentive of lower prices. The program may wish to consider consulting participants about such a change before implementation.
- Offer participants the option of having a shopper call them on a given day to take a shopping list. This could save staff time by avoiding the need to communicate through the office.
- Explore the feasibility of offering participants the option of placing orders online or by email, including the estimated rate of uptake for such an option and possible staff time savings.
- Seek other funding sources to support the program, or engage a fundraising consultant.

3.0 CONCLUSION

Grocer Ease is in a challenging position. Clients value the service highly. Compared to similar services in other Canadian communities Grocer Ease has more service hours, fewer store restrictions, and higher fees. While the program has been operating fairly informally, it is moving towards formalization and professionalization. Through this formalization, however, the employment status of the shopper role remains casual/on-call, a fairly precarious form of labour. The program also faces persistent resource constraints. There is a structural funding deficit. The primary funder's requirements are non-negotiable and are substantially different from other funding relationships of the organization. This is a particularly significant challenge, which may be a catalyst for seeking another organization to operate the Grocer Ease program.

Each of the questions that structured this review are revisited and addressed in this section.

1. *Is the target population being reached?*

To some extent. Many participants surveyed reported that the service was crucial to their maintenance of independent living situations. Intakes can be re-administered to ensure continued eligibility for the program, which would help to ensure that the service is reaching those most in need. Some participants' conditions and capacity will not change and so they should continue to receive the service. Some participants' need for the program is time limited, however.

At the same time, the total capacity of the program is unclear. Increased referrals would certainly help the program reach a greater portion of the target population, but in its current state this may in fact put the program into further financial difficulty. The seniors' population in Hamilton is growing (Hamilton's Plan for an Age-Friendly City, 2014) and with it, likely, demand for services that support people in their homes such as Grocer Ease. In this context, the program should consider future planning based on assumptions of a growth in demand for the service.

2. *Are the roles of the staff clearly understood?*

To some extent. Staff members generally understand their own roles well, but understanding of other staff members' roles should be clarified and strengthened. Shoppers understood their roles are well, with one clear and significant discrepancy around whether participants should be considered "shoppers' clients" or "the program's clients," which is an important distinction. This review also revealed concern and confusion around the current (interim) structure and whether or not an interim Program Manager was in place. A final concern with respect to roles was that many shoppers felt that the realities of their roles were not well understood by staff in the Banyan office.

3. *Does the Grocer Ease program meet the needs of the clients?*

Very clearly, yes. The high level of participant (client) satisfaction is one of the program's greatest strengths.

4. *Does Grocer Ease work effectively with community partners?*

For the most part. Partners described positive interactions with the program, but awareness of the program was mixed. The program could enhance its effectiveness in working with community partners by promoting the program more actively and strengthening connections that would facilitate referrals to (and potentially from) the program.

Questions 5 and 6 are discussed together in the section below.

5. *How should the Grocer Ease program be implemented in order to support its mandate while simultaneously controlling costs?*

6. *What is the appropriate structure to maintain the Grocer Ease program?*

Banyan's mission states that "Banyan Community Services delivers services and programs designed to help disadvantaged or at risk members of our community learn new skills, attitudes, and behaviors to help them build a better future."

Grocer Ease certainly serves community members who are disadvantaged or at risk, but given the design of the program its impacts in terms of new skills, attitudes, and behaviors to help community members build a better future are likely to be limited. Given that Grocer Ease clearly meets the needs of clients but only meets part of Banyan's mission, this review suggests that Grocer Ease may not be a good fit with Banyan as an organization.

If Banyan concludes that it will continue to operate Grocer Ease from its organization, this review recommends the following changes to the program's structure to continue to meet its mandate of supporting at-risk individuals in their homes and control costs. (These recommendations are also found in Section 2.17 above.)

- Instead of having a separate Office Manager and Program Manager, this review recommends creating the position of a **Program Coordinator** who would be available in the office during business hours to receive calls from participants and support shoppers by phone as needed. The coordinator would also spend a portion of their time in the early weeks of the position going out into the community to strengthen connections to potentially referring partners.
- Consider establishing a system of **Lead Shoppers** to be available to support fellow shoppers as issues may arise during the working day, and to act as back-up emergency contacts. Increased responsibilities as a Lead Shopper should be reflected in compensation.
- Develop a strategy to connect with partners and increase referrals. The program should be prepared for increased referrals in terms of staff capacity and costs if promotion activities are undertaken. As part of the strategy, develop a document with a detailed program description, including a Frequently Asked Question-style section to share with partners.

- Explore partnerships with suppliers to see if discounts are available. If partnerships are established, they should be implemented only with new participants to minimize service disruption for participants. Alternatively, participants could opt-in or out of such store limitations given the incentive of lower prices. The program may wish to consider consulting participants about such a change before implementation.
- Offer participants the option of having a shopper call them on a given day to take a shopping list. This could save staff time by avoiding the need to communicate through the office and possibly not receiving messages in a timely manner.
- Explore the feasibility of offering participants the option of placing orders online or by email, including the probably rate of uptake on such an option and possible staff time savings.
- Seek other funding sources to support the program, or engage a fundraising consultant.

APPENDIX A – COMPARABLE PROGRAMS

- **Sendial Program - Flamborough Information and Community Services (Flamborough, ON)**
<http://www.hnhbhealthline.ca/displayService.aspx?id=80388>
- **Northern Provincial Grocers – (Burlington, ON)**
<http://www.northernprovincial.com/about.html>
- **Grocery Gateway - Better Living/Longos (Toronto, ON)**
<http://www.betterlivinghealth.org/content/grocery-gateway>
- **Kerby Centre - Senior Grocery Delivery (Calgary, AB)**
<http://kerbycentre.com/calgary-adult-services/grocery-delivery/>
- **Golden Circle Senior Resource Centre - Grocery delivery (Red Deer, AB)**
<http://www.goldencircle.ca/grocery-delivery.htm>
- **Senior Outreach Society - Grocery Shopping Program (Phone-In Service) (Kamloops, BC)**
<http://www.kamseniorsoutreach.ca/groceryshopping.html>

APPENDIX B – PARTICIPANT SURVEY

1. How would you rate the quality of service you received from Grocer Ease?
 Excellent Good Fair Poor

2. To what extent would you agree or disagree with the following statements:
 - a) The Grocer Ease service meets my needs?
 Strongly Agree Agree Disagree Strongly Disagree

 - b) I am treated in a polite respectful manner by the shoppers and other staff of Grocer Ease.
 Strongly Agree Agree Disagree Strongly Disagree

3. Are you aware of the Grocer Ease complaints procedure?
 Definitely Somewhat No

4. Are you aware that a complaint will not stop you from obtaining the service?
 Yes No

5. If a friend were in need of similar help, would you recommend the program to them?
 Definitely Somewhat No

6. What did you like most about the Grocer Ease service?

7. What did you like least about the service?

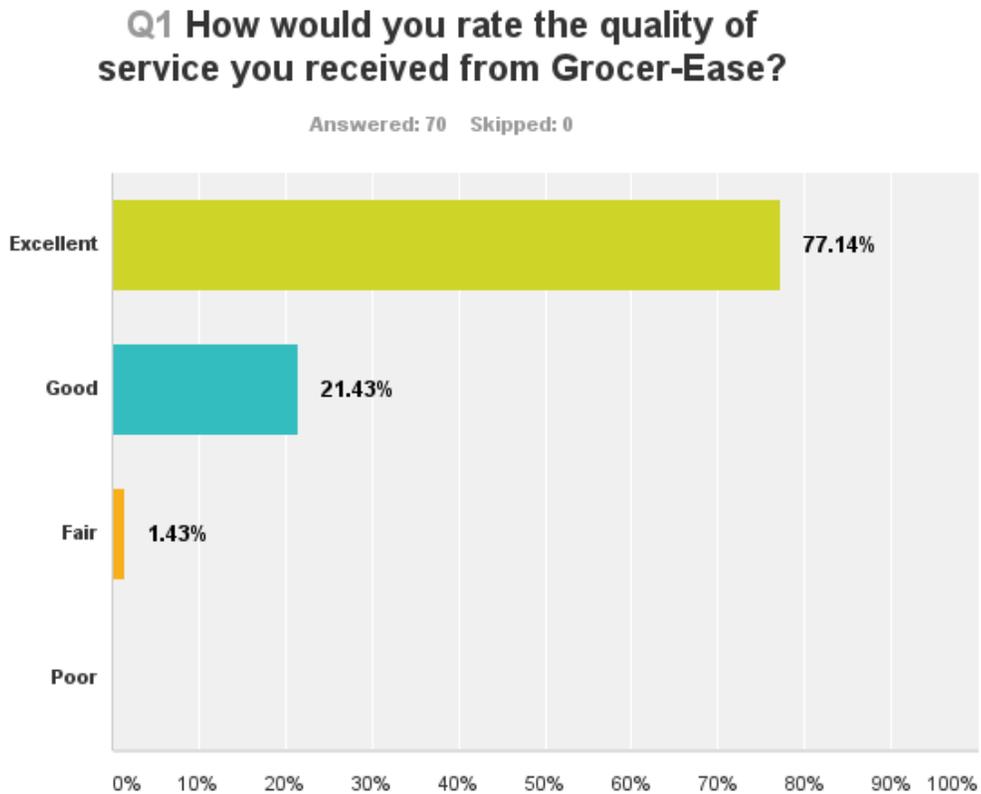
8. Do you have any suggestions for improving the service?

9. Is there someone else we could talk to who knows about how the program has helped you? A caretaker, a friend, or a family member?
 Yes No
Name:
Relationship to participant:
Phone number:

10. Is there anything else you would like to tell us?

APPENDIX C – PROGRAM PARTICIPANT SURVEY RESULTS

Figure 1

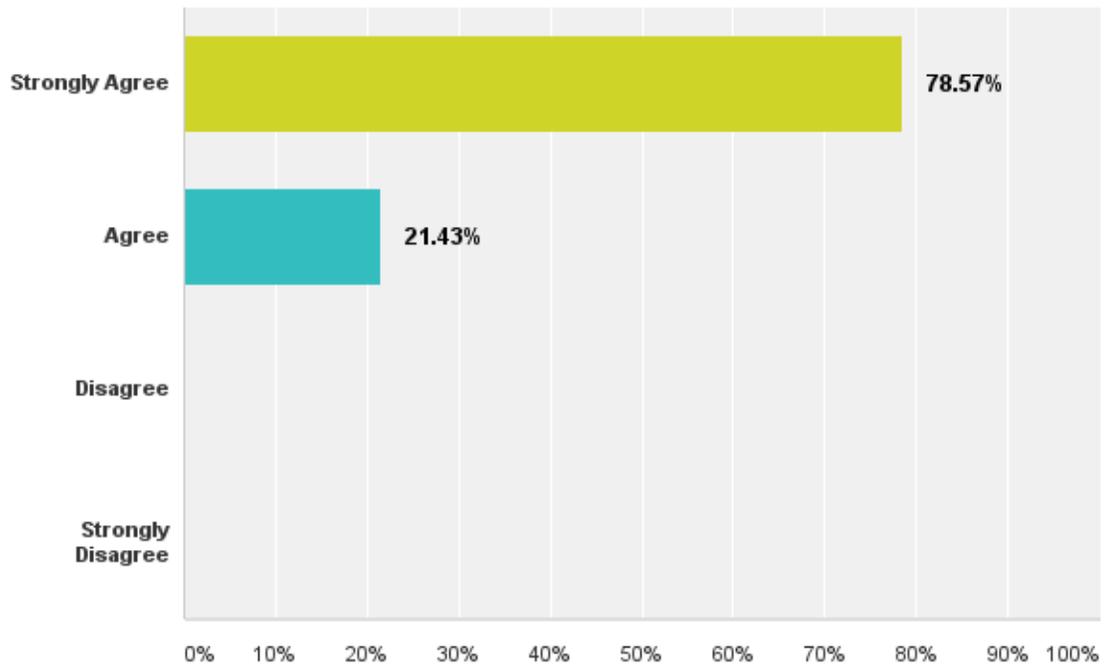


Over 98% of respondents rated the Grocer Ease service positively. Over three-quarters of participants (77%) rated the service as “Excellent.” Of the remaining participants, a quarter (22%) rated the service as “Good”, and a small proportion (1.4%) rated it as “Fair.”

Figure 2

Q2 To what extent would you agree or disagree with the following statements: The Grocer-Ease service meets my needs

Answered: 70 Skipped: 0

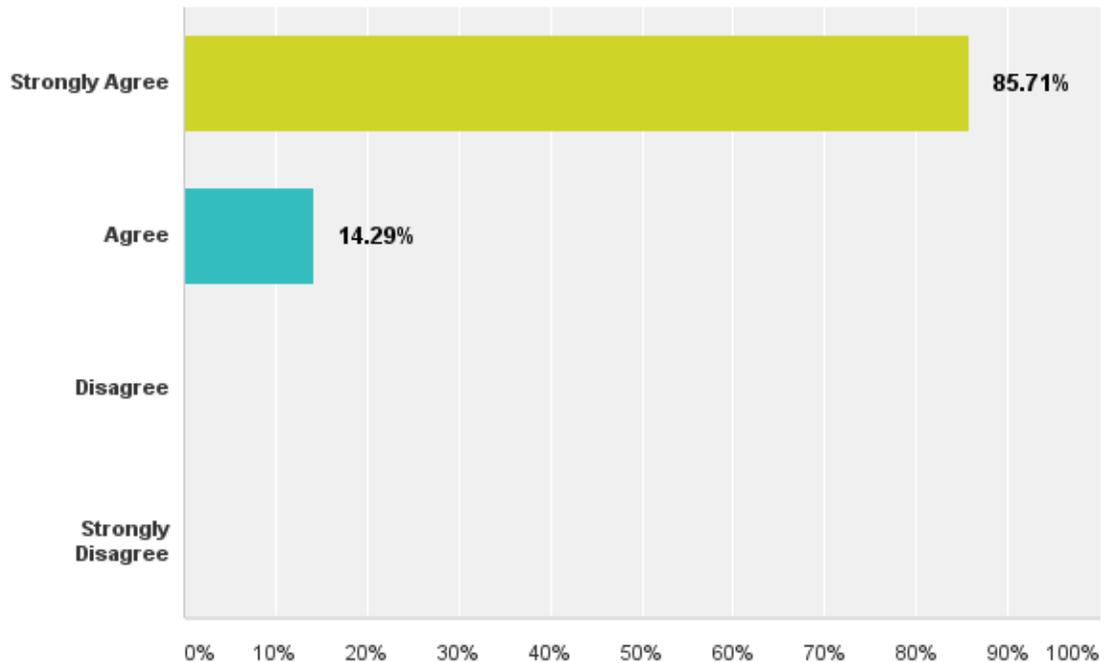


100% of participants felt that the service met their needs. A fifth of participants (21%) agreed, while the majority strongly agreed (79%).

Figure 3

Q3 To what extent would you agree or disagree with the following statements:I am treated in a polite respectful manner by the shoppers and other staff of Grocer Ease.

Answered: 70 Skipped: 0

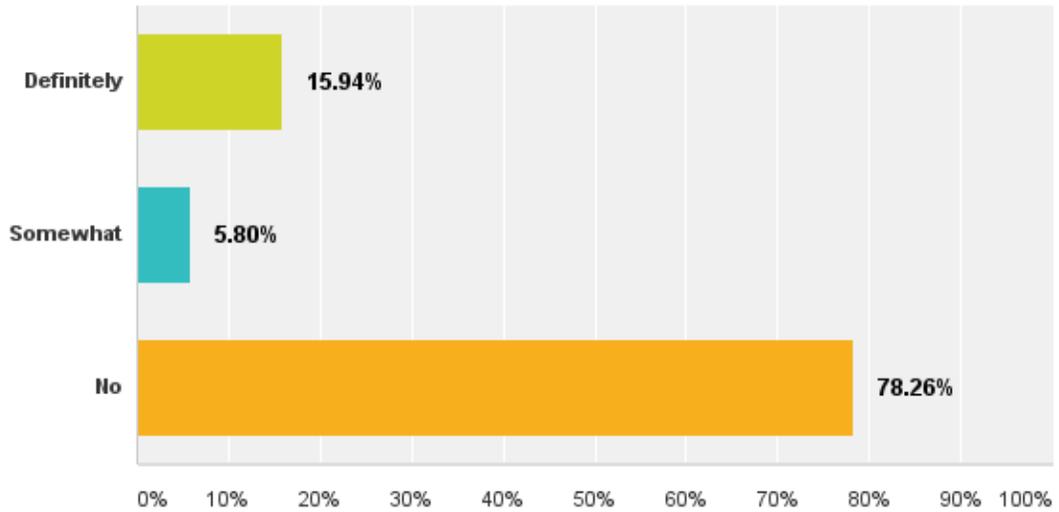


100% of participants agreed that they were treated in a “polite respectful manner” by the Grocer Ease team. The majority (86%) strongly agreed with this statement, and the remaining participants (14%) agreed.

Figure 4

Q4 Are you aware of the Grocer Ease complaints procedure?

Answered: 69 Skipped: 1

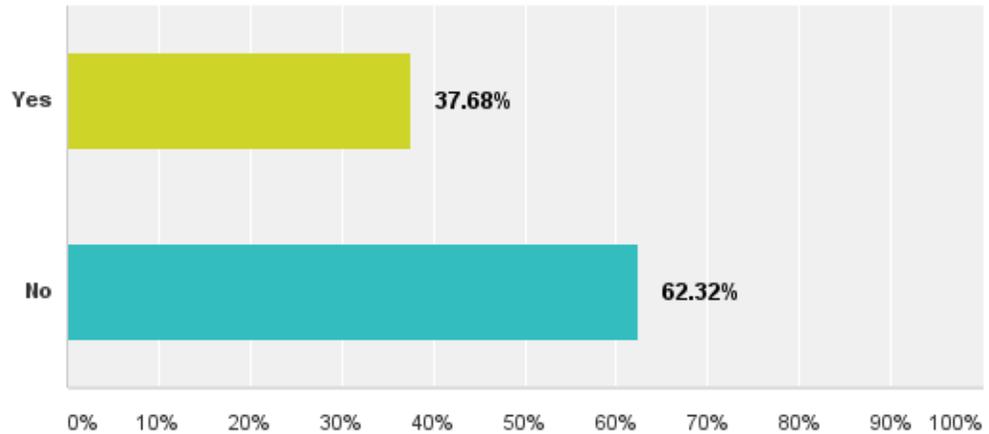


Most respondents (84%) were unclear about the complaints procedure. Some (6%) stated that they were “Somewhat” aware of the process, while most stated that they were not aware (78%). The remaining 16% stated that they were “Definitely” aware.

Figure 5

Q5 Are you aware that a complaint will not stop you from obtaining the service?

Answered: 69 Skipped: 1

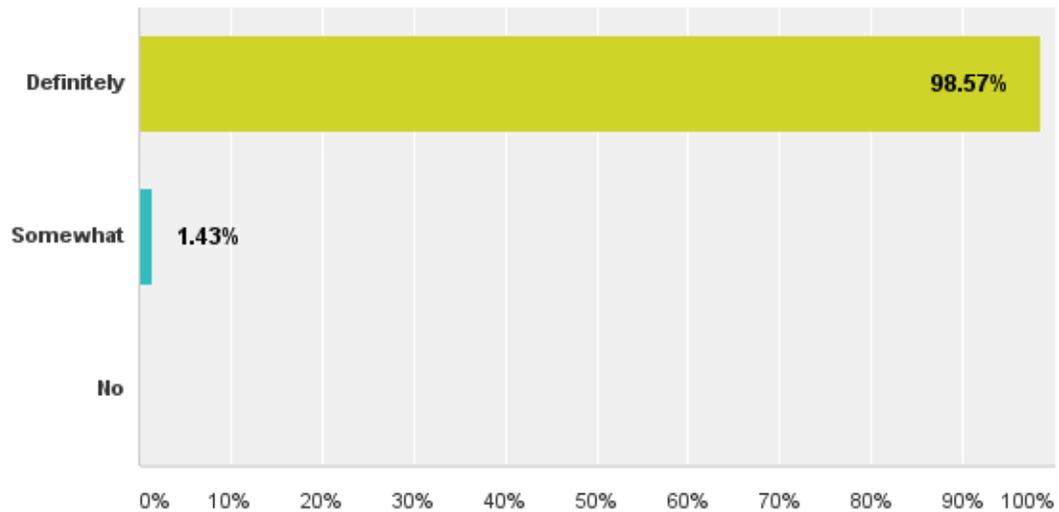


Over half (62%) stated “No”, they were not aware that a complaint would not stop them from obtaining the service. The remaining participants (38%) stated that they were fully aware that a complaint would not interfere with service.

Figure 6

Q6 If a friend were in need of similar help, would you recommend the program to them?

Answered: 70 Skipped: 0



Over 98% of participants said that they would “Definitely” endorse the program if a friend was in need of similar help. The remaining 1% stated that they would recommend the program “Somewhat”.

Program Benefits¹

Survey respondents made 221 comments about **benefits** of the Grocer Ease service.

Categories of benefits described by respondents, from most to least common, were as follows (the number of comments in each category is in brackets):

- Shoppers (45)
- Quality of service (42)
- Appreciation (30)
- Flexibility/convenience (27)

¹ Data from open-ended questions in participant and family member/caretaker surveys have been analyzed together due to the small number of respondents from the latter group. Therefore themes discussed in this section are drawn primarily from participants, but may also include feedback from the 6 family member/caretaker respondents.

- Independence (23)
- Communication (14)
- Quality of life (13)
- Social connection (9)
- Schedule (7)
- Choice (5)
- Prices (3)
- Depend on service (2)
- Only program available (1)

The greatest co-occurrence of categories within benefits was between “quality of service” and “shoppers.”

Drawbacks

108 comments related to drawbacks of the service were given by respondents. These are the categories from most to least common:

- No complaints (53)
- Schedule (18)
- Communication (9)
- One store per shopping order (7)
- Purchase unwanted products/brands (6)
- Price (6)
- Administration (5)
- Shopper (3)
- Limited options (1)

The most common sub-category within “drawbacks” was “no complaints,” suggesting that actual comments describing program drawbacks only numbered 55. The next most common sub-categories, schedule and communication, are discussed briefly here.

Schedule: several respondents mentioned not having deliveries on Fridays, the difficulty of waiting all day for a delivery. There was also some confusion about when to call if a delivery is wanted on a Monday, as well as who to contact for a change in delivery.

Communication: several participants and family members described difficulty having messages get through to their shoppers.

Suggestions

Respondents were also asked if they had any suggestions for how to improve the program. The 22 suggestions received are summarized in the table below.

Suggestions Sub-Themes (# of comments)	Most common suggestion
<ul style="list-style-type: none"> • Schedule (7) 	Return to Friday service, and increase times during which participants can call the office.
<ul style="list-style-type: none"> • Communication (6) 	Advertise program more.
<ul style="list-style-type: none"> • Administration (4) 	Various suggestions, including ensuring that messages are received and that shoppers have change.
<ul style="list-style-type: none"> • Multiple stores per shopping order (2) 	Some participants would prefer getting items from multiple stores due to lower prices or availability. One participant was willing to pay more for this service.
<ul style="list-style-type: none"> • Additional Services (2) 	Include prescription pickup and grocery shopping at Walmart.
<ul style="list-style-type: none"> • Price (1) 	Offer the service at no cost to participants

APPENDIX D - FAMILY MEMBER OR CARETAKER SURVEY

1. How would you rate the quality of service your family member (or the participant) has received from Grocer Ease?
 - a. Excellent Good Fair Poor

2. To what extent would you agree or disagree with the following statements:
The Grocer Ease service meets my family member's (or the participant's) needs?
 - a. Strongly Agree Agree Disagree Strongly Disagree

 - b. Please explain:

3. My family member (or the participant) is treated in a polite respectful manner by the shoppers and other staff of Grocer Ease.
 - a. Strongly Agree Agree Disagree Strongly Disagree

4. Are you aware of the Grocer Ease complaints procedure?
 - a. Definitely Somewhat No

5. Are you aware that a complaint will not stop your family member (or the participant) from obtaining the service?
 - a. Yes No

6. If a friend were in need of similar help, would you recommend the program to them?
 - a. Definitely Somewhat No

 - b. Please explain:

7. What did you like most about the Grocer Ease service?

8. What did you like least about the service?

9. Do you have any suggestions for improving the service?

10. Is there anything else you would like to tell us?

APPENDIX E – FAMILY MEMBER OR CARETAKER SURVEY RESULTS

Figure 7

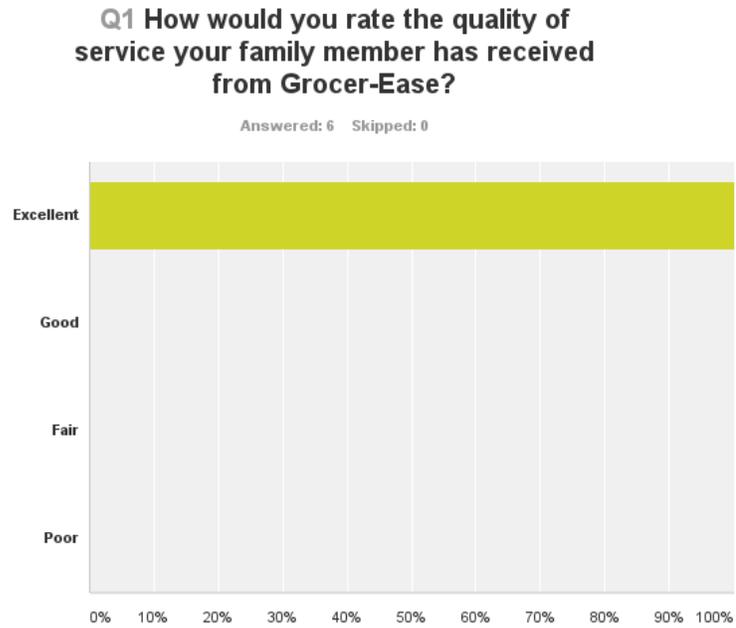


Figure 8

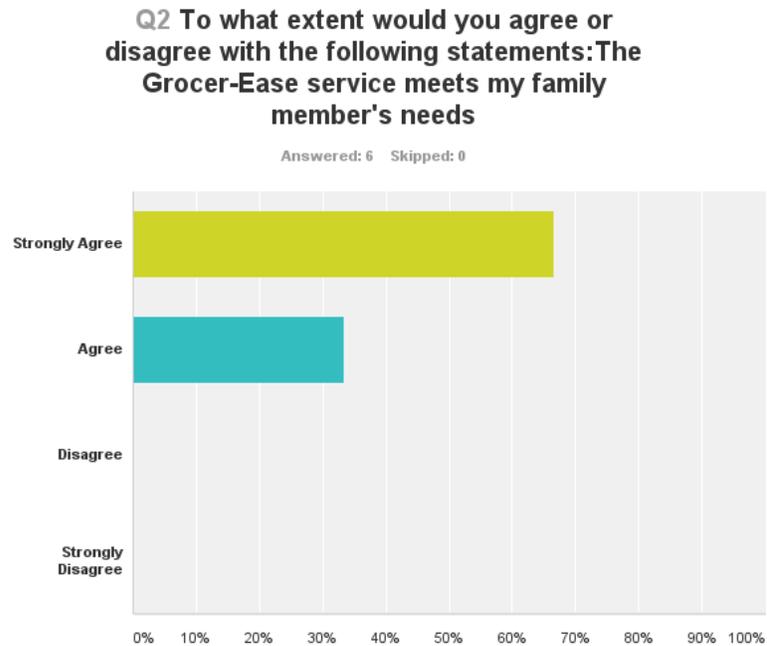


Figure 9

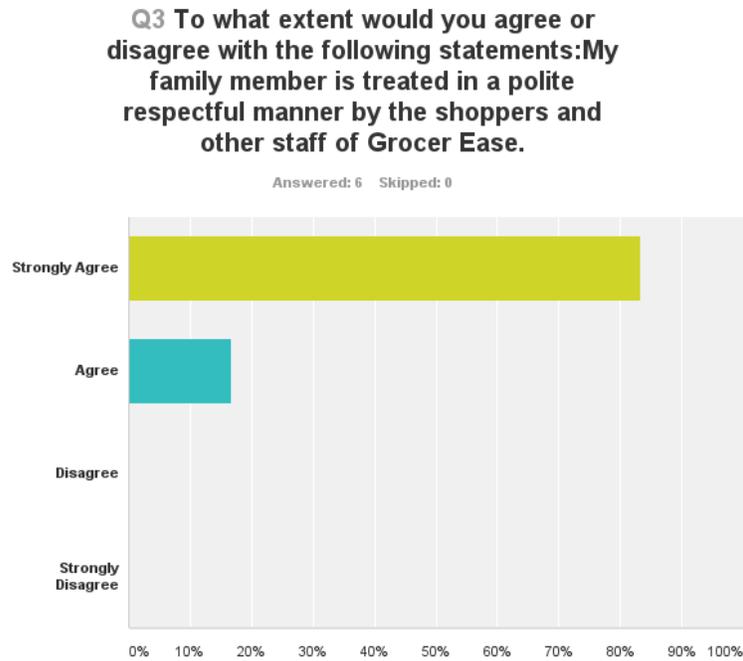


Figure 10

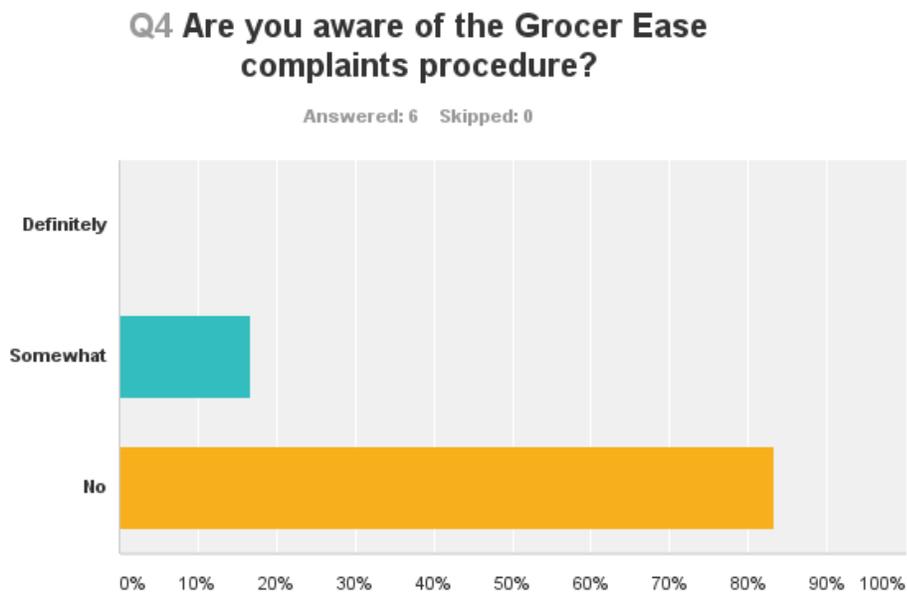


Figure 11

Q5 Are you aware that a complaint will not stop your family member from obtaining the service?

Answered: 6 Skipped: 0

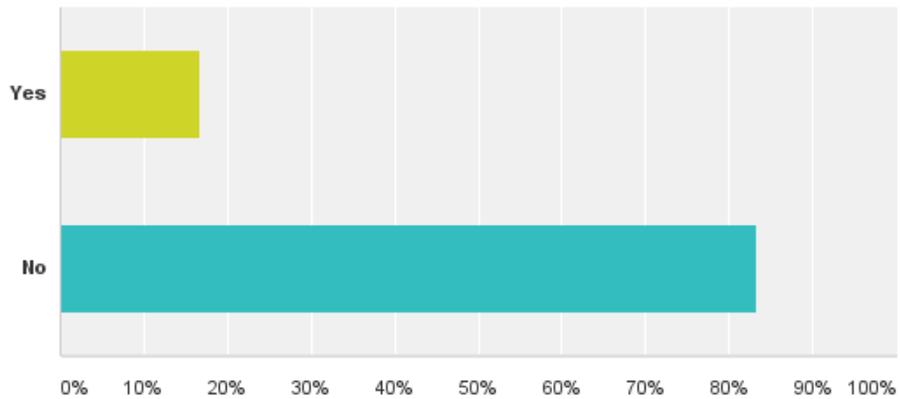
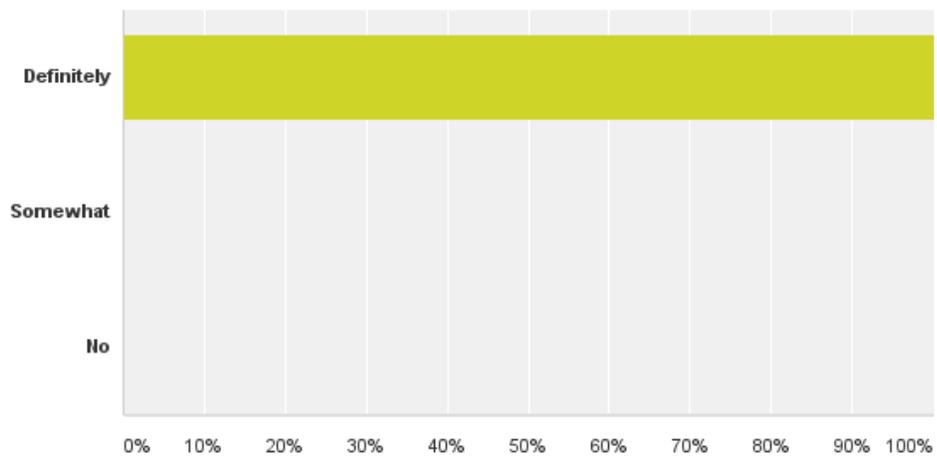


Figure 12

Q6 If you knew someone who was in need of similar help, would you recommend the program to them?

Answered: 6 Skipped: 0



APPENDIX F - SHOPPER FOCUS GROUP DATA

Focus Group Script

- Introduction
 - Purpose: to assess how effective current structure, whether it's meeting the needs of the funder, Banyan, and the community
1. To get started, we were hoping to draw out a map of the program structure.
 - a. What things are shoppers responsible for?
 - b. Who do you report to?
 - c. What are you responsible for?
 - d. Who do they report to?
 - e. What are they responsible for?

(List only things participants agree on; capture any points of contention in a parking lot.)

2. What's **working well** with Grocer Ease?
3. Which areas of the program would you say could use some **improvement**?
4. Considering what we've talked about so far today, do you think that the program is doing **what it set out to do**?

*Note re goals: Banyan views it as a prevention program, preventing clients from moving into more expensive health care services by being maintained well in their homes.

5. We took a look at some other similar programs across the country, and we'd like to talk about some of the differences and what some possible **advantages and disadvantages** of each might be. Keep in mind that we're trying just to explore options, not to make any decisions. What would you see as some benefits and concerns for:
 - fixed shopping times (e.g. Friday mornings for an hour)
 - a flat fee
 - Partnering with suppliers (e.g. Grocery gateway for non-perishables)
 - Limiting the grocery stores available
 - volunteers shopping and someone else delivering and meeting with the participant
6. Thinking about everything we've touched on today, what, if anything, would you **change** about the program if you could?
7. Is there anything we should know about that you haven't had a chance to say?

Focus Group - Raw Data

Former GE structure:



Role: Shoppers

Responsibilities:

- Take lists (clients choose store)
- Explain limits – e.g. stores, load
- Go over flyers
- Call client re: substitutions (increases time of shop)
- Watching health, safety, behaviour, of clients
- Shop
- Deliver, sometimes unload
- Collect payment
- Paperwork, reports – every 2 weeks on a specific day - bill 1 unit of pay/service for paperwork, paperwork exceeds this
 - Submit
 - List clients
 - Amount spent
 - Card or debit
 - Service charge
 - Mode of payment
 - Mileage
 - Bank deposits
 - Record deposit slip – mode of payment, attach copy to report
 - Deliver reports to office – get mileage reimbursement, not paid for time
- Order gift cards (from office) 2 days ahead
- Pick up gift cards
- Responsible for Banyan debit card

Role: ? (previously office manager)

Responsibilities

- Answer client calls
- Assigning clients
- Collecting lists, giving lists to shoppers

Working Well

- Online paperwork
- New reporting system (mileage etc.) – all on 1 page instead of 3
- Gift cards, cover more stores
- (Banyan)Debit cards
- Deposit system (for some)

Could use improvement

- Communication
- Consistency around time billed for administration – deposits, paperwork
- Promotion of program
 - Person (to do this promotion)
 - Details, flyers, business cards
 - Connections with other agencies not to do groceries
- Staff in office with familiarity with and training on program
- Redistributing shops among shoppers
- Process around delays/workloads
- Clients should get groceries next day – consistency regarding client availability for receiving groceries

Is the program doing what it set out to do?

- Yes!

Feature	Advantages	Disadvantages
1. Fixed shopping times	Shoppers not working at night	<ul style="list-style-type: none"> • Could never get to everybody, limit clients • Holiday-related (scheduling) • Would load some days heavily
2. Flat fee	clients (benefit), especially if on social assistance	<ul style="list-style-type: none"> • Lose shoppers • Increased shopping time • Load issue (weight) • Funding shortage
3. Partnering with suppliers		<ul style="list-style-type: none"> • Some clients are adverse to some stores • Lose client control • Lose flyering • Accountability problems
4. Volunteers shop, paid staff delivers		<ul style="list-style-type: none"> • Lose clients • Accountability problems
5. Limiting stores		

What would you change?

- Someone in office just for Grocer Ease to answer questions, a back-up person to call, someone accessible and knowledgeable about Grocer Ease
- Better communication, consistency –including email, maybe an app for use on phone (for Banyan email)
- Clear policies about what shoppers get paid for (duties)

- Communication with shoppers about money balancing

Parking Lot (Other important issues raised but not addressed)

- Call reimbursement – personal cell phones used mostly – could use courtesy phone at store
- Need to know emergency contact and procedure, including after hours
- Remuneration – pay equity concerns
- Different interpretations re: clients of shoppers/clients of program

APPENDIX G – KEY INFORMANT INTERVIEW GUIDE

1. What kinds of program data are you collecting/do you have now for the program?
Could you share it easily?
 - a. Master list of clients?
 - i. Excel or SPSS used?
 - b. Client assessment forms?
 - i. Clients still assessed if referred by another agency?
 - c. Ongoing client structured interviews?
 - i. Reporting structure in place?
 - d. Client satisfaction forms/surveys?
 - i. Database in place?
 - ii. Should we maybe focus on entering and analyzing these rather than designing and administering another one? Or base new one off old with adjustments?
2. Are you aware of comparable programs in other communities?
3. Who would you consider “community partners” of the program? How connected should Grocer Ease be to other community supports? What level of engagement and participation is required in light of Banyans’ strategic directions?
4. What’s the best way to schedule the staff focus group?
5. (from some of the findings and recommendations from the 2003 2013 reviews)
 - a. Would you say that most staff members have been with the program for a long time still?
 - b. Is service demand growing?
 - c. Discussion of informality versus more management and control. Is this an issue today?
 - d. Funding rough breakdown?
 - i. Fees for service?
 - ii. Fundraising?
 - iii. Banyan still contributing significantly to budget (as required by Ministry)?
 - e. How much of the program is volunteer run right now? Working well? Shoppers still paid for some time and volunteer for other time?
 - f. Risk management an issue? (with volunteers or other issues. e.g. intake assessment by shoppers?)
 - g. Nutritional education – what is the process for assessing and intervening with a client list that raises concerns?
 - h. What are current funder expectations to connect with Francophone and aboriginal communities?

APPENDIX H – PARTNER CONSULTATION GUIDE

[Introduction: Describe Grocer Ease program if respondent is not familiar.]

If partner not connected to Grocer Ease:

1. Do you think your organization would be interested in connecting with the program?
2. Gain an understanding what kind of awareness there is of the program, and what kind of information a community partner might need to make a referral.
3. What is your sense of the need for this program among your clients?
4. Would cost be a barrier for your clients?

If partner is connected to Grocer Ease:

1. What has your experience been with the program?
2. Have there been any changes in the amount of referrals? Why/Why not?
3. What is your sense of the need for this program among your clients? Would \$9 cost be a barrier?
4. Do you have the sense that other staff are aware of the program?
5. Other community partners aware of the program?