

COVID-19 MEMBER IMPACT STUDY EXECUTIVE SUMMARY

*In late 2020, Meals on Wheels America developed a strategic research portfolio to better understand how the COVID-19 pandemic has impacted – and will continue to impact – older adults, local Member programs and the nutrition and aging landscapes at large. The learnings within our research portfolio will help to inform and guide our decision making moving forward and enable us to best support our national network and the older adults it serves. The **COVID-19 Member Impact Study** is one component of this portfolio focused on gaining a deeper knowledge of the breadth and depth of the pandemic’s impact on Member programs’ operations since public health and safety measures first began in March 2020.*

MEALS ON WHEELS AMERICA MEMBERS BEFORE COVID-19

In 2019, Meals on Wheels America spearheaded the *More Than a Meal*[®] Comprehensive Network Study to quantify and describe its network of 1000+ Member programs, specifically programs’ services, client needs, capacity and capabilities. At that time, findings showed that Members were largely committed to delivering on a comprehensive service model and provide a nourishing meal, a friendly visit, a safety check and connections to a number of other supporting services. Even so, 85% of Members saw at least some unmet need in their communities – two-thirds saw more than minimal unmet need,¹ although 90% of Members said they could serve more seniors, if they received funding to do so²...and then COVID-19 hit.

THE PANDEMIC’S EARLY IMPACT ON THE NETWORK

In March 2020, as COVID-19 hospitalizations increased and shelter-in-place orders were announced in various states, Meals on Wheels America heard tales from Members about sudden congregate program closures, shuttered in-person supportive services and loss of volunteer capacity coupled with unprecedented demand for home-delivered meals. Entire programs and operations were overhauled practically overnight. Meals on Wheels America spearheaded two pulse surveys among Member programs throughout the late spring and summer 2020 to quantify the extent and variety of these service changes, assess Members’ needs as a result of COVID-19 and better understand concerns about long-term sustainability. These surveys revealed a disrupted network facing unprecedented demand, increased costs and no clear end in sight.

UNDERSTANDING THE BREADTH AND DEPTH OF COVID-19’S IMPACT ON MEMBERS

Meals on Wheels America and Trailblazer Research embarked on a multi-pronged study at the end of 2020 designed to build on the previous COVID-19 impact research conducted earlier in the year – updating the pulse survey series; quantifying Member accomplishments, pivots, challenges, perceptions and expectations; and helping Meals on Wheels America to understand how best to meet Members’ needs during the pandemic and beyond. This year-end study combined a quantitative survey of 351 Member programs supplemented with qualitative online focus groups made up of 17 Member programs to round out and add to this body of work.

¹ At least some unmet need: Responded “1” to “6” to Comprehensive Network Study (CNS) survey question: Overall, our program is... (1-7 scale, 1= Leaving a lot of people that need HOME DELIVERED meals unserved,” 7=“Serving less than “Serving HOME DELIVERED meals to just about everyone in our community that needs one.” More than minimal unmet need: Responded “1” to “5.” n=407.

² CNS survey question *Assuming there was funding that came along with each additional client, would you be able to serve 10% more clients than you do now?* n=413.

The remainder of this summary shares research highlights, key learnings and implications from the full COVID-19 Member Impact Study.

RESEARCH HIGHLIGHTS

Member programs were presented with a number of immediate challenges that required making significant changes as soon as the pandemic hit in March 2020. Below is a closer look at some of these changes, along with implications they may have for Member programs moving forward:

CHANGES TO HOME-DELIVERED MEAL SERVICES

90% of Members reworked their home-delivered program in response to the pandemic.

- **Programs began serving more meals and more seniors but delivering on fewer days.**
 - Among programs that provided or planned to provide daily delivery at any timepoint, the number of programs providing daily delivery to most of their clients was down 27% (from 95% pre-COVID-19 to 70% at the time of the November 2020 survey) Membership-wide as programs had shifted their delivery schedules for safety and capacity reasons.
 - Reduced delivery days meant more stable meal forms were required, with more programs turning from hot meals to frozen or shelf-stable meals.
- **Members were serving on average 59% more home-delivered meals in November 2020 than they were before COVID-19.**
 - Nine in 10 Members were still serving at elevated volumes in November 2020.
 - Meal services were still falling short of need, with 86% of Members reporting that there was unmet need for home-delivered meals in their community.
 - 29% said they would have to increase their home-delivered meal efforts by nearly double or more to serve the unmet need.
- **Members largely agreed that they would be facing a barrage of challenges in their future. They weren't thinking about a return to normal – they were thinking about a whole new normal.**
 - 96% thought their food and production costs would stay high.
 - 82% thought their new clients would be here to stay.
 - 74% thought they would lose the financial support but keep the additional clients.
 - Members thought that client needs and their own programs' finances would get worse before they get better.³
 - 76% of Members believed their new model for home-delivery may be here to stay even after COVID-19.
 - Members did describe several benefits to using frozen meals, such as greater client choice, convenience, efficiency and less waste.

CHANGES TO CONGREGATE SERVICES

Congregate dining services closed abruptly as physical distancing measures were put in place, leaving many Members to have to quickly figure out ways to safely continue to serve their congregated clients.

- **Members adapted their congregated programs in a number of ways, including:**

³ In an open-ended question asking what they thought the major challenges and concerns for their home-delivery program would be 6 months from now, a year from now, and three years from now, 67 Members mentioned themes of increased need/service were mentioned as a top challenge 6 months from now, 90 mentioned increased need/service as a top challenge a year from now, and 84 mentioned increased need/service as a top challenge 3 years from now. 129 Members mentioned themes of finances as a top challenge 6 months from now, 172 Members mentioned finances as a top challenge a year from now, and 62 mentioned finances as a top challenge three years from now.

- Offering meals in a drive-thru or grab-and-go type format
- Switching congregate clients to home-delivered clients
- Offering congregate dining in limited capacity and/or on decreased days
- **50% of Members operating congregate programs at the time of this research said at least some congregate clients were not being served in any alternative format or home delivery capacity.**
 - One in five operational congregate programs had “lost” 50% or more of their congregate clients.
- **Rather than looking to return to normal offerings post-COVID-19, Members were looking at how they could offer improved congregate dining experiences to better match the preferences of their clients, who are typically retiring later and entering senior centers with new expectations and behaviors.**
 - Members were making investments to change their congregate meal sites with renovations, upgrades and redesigns of the facility itself.
 - Members were seeking ways to offer clients expanded choice at their congregate sites once they reopen.

CHANGES TO SOCIAL CONNECTION OFFERINGS

Meal delivery is often the only social interaction that many Meals on Wheels clients have, and changes that were implemented to the delivery model for safety purposes had impacted normal levels of social interaction.

- **Virtually all Members (98%) saw reducing social isolation as a mission-critical aspect of their work.**
 - Members acknowledged how important a regular home visit is, even if it is a socially distant version of their former protocol.
- **More than half of programs had or had tried their hands at creating programs to address social isolation.**
 - The most popular social isolation interventions throughout the pandemic had been low-tech solutions, such as continuing to deliver meals daily, making comfort phone calls and mailing cards from volunteers and staff.
- **More than half of Members believed they had slipped on delivering “more than a meal” during the pandemic.**
 - At the time this research was conducted, other supportive services beyond nutrition and social connection, such as transportation assistance and in-home safety/repairs, had often been placed temporarily on the back burner.

CHANGES TO VOLUNTEERS AND PROGRAM STAFF

Volunteers have always been critical to program operations, but a new challenge arose when the pandemic hit, as much of Members’ existing volunteer bases were older and at risk themselves.

- **Many Members saw increased volunteerism from younger demographics and new community sources.**
 - However, nearly three out of four programs agreed that leveraging volunteers would be a struggle moving forward.

CHANGES TO PARTNERSHIPS

Partnerships were one of many COVID-19-inspired changes that impacted a large swath of Members.

- **Members leveraged partners to help bridge gaps throughout the pandemic.**
 - 54% of Members experienced changes to their local partnership structures due to the pandemic.
 - 50% of Members leveraged local partnerships to supply emergency meals and help with maintaining programs due to COVID-19.
 - Local partnerships were increasingly prioritized, seen as more capable of offering choice subject to community preferences; as a way to signal commitment to the local business community; and more resilient to national supply chain disruptions that were particularly prevalent in the early days of the pandemic.

CHANGES TO FUNDING AND FINANCING

Financial concerns had been top-of-mind throughout the pandemic and are expected to remain so moving forward.

- **Increasing funding was a top priority for Members.**
 - Nearly three out of four programs mentioned funding as a priority in the next five years.
- **Flexible funding was key to Members throughout the past year.**
 - Equipped with funds that were not directly tied to meal service, Members were able to make financial choices that fit their needs and make necessary investments.
- **Costs had risen all around, and Members suspected increases and uncertainty would be here to stay.**
 - 74% were worried that attention/interest would wane, and they would lose the financial support they had been receiving but would keep the clients they had taken on since the start of the pandemic.
 - Increased costs were coming from safety supplies purchases (for 73% of Members), production costs (66%) and labor costs because of additional hours and/or decreased volunteers (56%).
- **The crux of the financial stress came from increased need without reliable funding streams.**
 - 42% of Members thought their financial security trajectory was more at risk because of COVID-19 – it would get worse before it gets better.

KEY LEARNINGS AND IMPLICATIONS

Members proved – to themselves, their communities and their clients – that they can and do serve a huge need. The experience of serving throughout the pandemic has given them the confidence, the credibility and the test case to fuel growth in the coming years.

2020: A YEAR OF INCREASED NEED, AWARENESS OF NEED AND MEAL SERVICE TRIALS

Seniors, senior needs and the programs that serve them had a higher than ever profile, beginning in March 2020. **Clients rushed in**, including a number of self-isolating individuals who were not regularly homebound by disability. Also, public awareness of senior hunger and vulnerabilities of immunocompromised populations led to **increases in volunteerism**, which – when volunteers were able to be accommodated – helped to supplant shortages experienced due to a drop off in older volunteers at the beginning of the pandemic. Finally, federal emergency aid and **donors, funders and grantors came through for Member programs**, opening doors for investments such as building improvements, staff expansion, new hires, vehicles and freezers in order to meet the heightened service volumes.

THE BIGGEST CHANGES FOR MEMBER PROGRAMS

One of the most significant changes across Members was the increase in the sheer **volume of service** – the number of meals served to a growing number of clients – as well as all the **operational changes** required to scale services and the financial adjustments that went hand-in-hand with such quick operational changes.

Members also had to quickly implement **new safety protocols** that forced them to reframe typical service. Such changes included shuttering or **transforming congregate programs** to serve those clients in different ways, and **reworking nutrition options and regular delivery schedules** to reduce contact and accommodate volume increases. However, in making efforts to reduce contact, Members found that addressing issues of social isolation among clients became a big challenge, as the extended friendly visits that usually serve as a key differentiator for Meals on Wheels programs were no longer an option.

All told, Members cited **increased funding** as a difference maker to facilitate the changes needed throughout the year, especially when allowed flexibility with that funding. When making the operational changes required to sustain throughout the year, many Members said the flexible federal and private funding highlighted opportunities for efficiency and optimization.

MEMBERS' BIGGEST CONCERNS LOOKING FORWARD

While maintaining a continued focus on sufficient pandemic response efforts, Members were also keeping an eye on what will be needed for future recovery and growth. They were still seeing a **sustained increase in clients** in need of services, with 86% of Members reporting they felt **there remained unmet need** for home-delivered meals in their community. At the same time, Members were also reporting **diminished attention and funding support** compared to when COVID-19 first hit, and they were as sure that funding would drop as they were confident the need would stay.

Members also had concerns over **general programming, operations and client well-being**. This included uncertainty over how best to manage ongoing challenges they will likely be facing with their traditional volunteer base, comprised largely of older **volunteers** who may remain at risk. Members were also considering how to navigate all of the unknowns surrounding **congregate meal offerings** – namely, how willing will seniors be to attend and how flexible will the funding be. Finally, Members were concerned about the **longer term impacts of prolonged social isolation** driven by the pandemic on their clients, possibly making them even more vulnerable than pre-pandemic.

MEMBERS' AREAS OF FOCUS LOOKING FORWARD

Working to overcome their primary concerns and push for sustainable services moving forward, Members were directing their focus to a handful of key areas, including figuring out **how to serve more meals to more seniors**. For some, this means keeping up with increases that came about as a result of the COVID-19 surge. For others, this means expanding routes and extending service to more rural areas and/or more vulnerable populations. And for others still, this means being able to sufficiently meet the natural increases in need associated with the growing senior population in general.

Members also explored ways to **secure the funding needed** to continue to meet these sustained increases in demand while also searching for how to optimize their programming for the seniors they were serving – for example, considering new approaches to meal choice offerings.

Finally, Members leveraged the operational and programmatic changes they had had to make over the past year as a starting point for **rethinking some of their typical offerings** in the future. For example,

they were exploring a wider variety of social isolation reduction initiatives, looking for additional ways to provide “more than a meal” and considering how they could revitalize their congregate meal offerings.

COVID-19 HAS CHANGED THE METHODS, BUT NOT THE MISSION

This research effort has helped Meals on Wheels America to better understand the shorter term impacts that COVID-19 has had on Member programs and the ways in which Members were able to quickly adapt their operations without interrupting or shuttering service. The findings also uncovered a number of ways in which Members are considering leveraging the changes they have had to make in light of the pandemic into lasting adjustments to their services. While programs may look different now and moving forward, one thing remains clear: Members are more dedicated than ever to achieving their mission and doing whatever it takes to ensure that no senior in need is left hungry or alone.