



MEALS on WHEELS
AMERICA



THAN
A MEAL®

COMPREHENSIVE NETWORK STUDY

A STORY OF MEALS ON WHEELS IN COMMUNITIES ACROSS THE COUNTRY

STUDY SUMMARY

Acknowledgments:

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The *More Than a Meal*® Comprehensive Network Study was produced by Meals on Wheels America and conducted by Trailblazer Research, with funding from Aetna, a CVS Health company.



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BACKGROUND

Since the first known delivery in the United States by a small group of Philadelphia citizens in 1954, Meals on Wheels has been guided by a single goal – **to support our senior neighbors and extend their independence and health as they age**. What started as a compassionate idea has grown into one of the largest and most effective social movements in America, currently operating in nearly every community in the country. This grassroots group of local community-based programs is dedicated to addressing senior hunger and isolation, and Meals on Wheels America has been supporting them in our role as a national leadership organization for almost 50 years. To that end, we provide grants and funding, education and training, research, and advocacy support to empower local programs that are members of our organization to strengthen their communities, one senior at a time.

Local Meals on Wheels programs provide home-delivered and/or congregate meals to seniors across the United States and have long been attuned to the needs of their local communities. This local focus enables programs to plan for and respond to the unique needs specific to their communities – **one of the most powerful attributes of this national network**. And because of this level of distinctive responsiveness, Meals on Wheels America has long known anecdotally that these programs deliver much more than just a meal to their senior clients, including: nutrition services, social companionship, regular safety and wellness checks, and access to myriad other community-based services that may be essential to keeping them healthy, safe and independent in their own homes and communities.

To help the Meals on Wheels network continue to strengthen and build on its current impact, we knew that a comprehensive, data-driven profile of Meals on Wheels America member programs' client demographics, services and organizational make-up would be vital. Such specificity and depth will serve as valuable tools to help identify the greatest opportunities for effective partnerships and solutions that can then be replicated and scaled to further benefit a rapidly aging population. **That is why we expanded our *More Than a Meal*® body of research to conduct a first-of-its-kind national profile of senior nutrition programs and the seniors served by them: the *More Than a Meal*® Comprehensive Network Study, conducted by Trailblazer Research and funded by Aetna, a CVS Health company.**

RESEARCH GOALS

- **DESCRIBE:** Assess the capacity and capability of the nationwide senior nutrition program network by exploring each organization's client base, reach, infrastructure, systems and operations;
- **QUANTIFY:** Consider funding sources, as well as the types and extent of services offered by local Meals on Wheels programs (both congregate and home-delivered) and, where available, the impact associated with the services provided;
- **IDENTIFY:** Surface common patterns, barriers and opportunities in our network's programmatic needs and rapidly growing and evolving client population that can be turned into insights and actions to carry programs forward, whether through policy changes, new tools and resources, partnerships, etc.; and
- **EMPOWER:** Equip local Meals on Wheels programs with data that will enable them to enhance planning, benchmarking, fundraising and meeting the needs of partners and funders.

The *More Than a Meal*® Comprehensive Network Study has provided us with an accurate and in-depth national picture of Meals on Wheels America's membership. Armed with the resulting information and analysis, we now know more than ever before about who our programs serve, how each is funded, the types of services offered and the incredible impact each program makes every day.

WHO IS MEALS ON WHEELS?

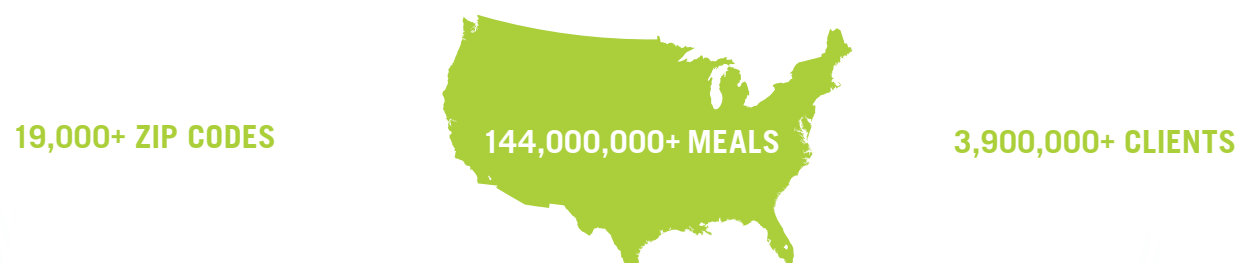
PARTICIPANT OVERVIEW

99% of all Meals on Wheels America member programs (referred to as "local programs" in this report) participated in the Comprehensive Network Study.

Through this effort, we reaffirmed that local programs are united in goals and mission – committed to serving seniors more than just a meal. Below is an overview of who these programs are, the clients they serve and the services they offer:

Size of Local Meals on Wheels Program	Annual Senior Nutrition Budget
Extra-Small	<\$150K
Small	\$150K-499K
Medium	\$500K-999K
Large	\$1M-2.9M
Extra-Large	\$3M+

TOGETHER, LOCAL PROGRAMS ANNUALLY SERVE:

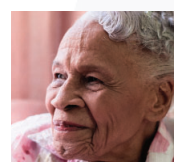
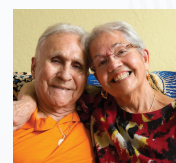
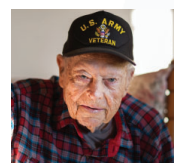


CLIENT OVERVIEW

Client data collected from local Meals on Wheels programs in this study affirms they do, indeed, serve the most vulnerable and those who may not be served by other programs/services.

For example:

- More than one-half of all clients served are 75+, and one-fourth of clients are 85+.
- More than 50% of clients are widowed.
- Two-thirds of clients are at or below the poverty line, with one-third having a monthly income of less than \$1,000.
- While minorities make up 23% of seniors nationwide, they make up 33% of local programs' clientele.
- Local programs serve more than 475,000 veterans.
- 27% of local programs say more than half of their home-delivery clients need home modifications to help them live safely and independently in their homes ("aging in place" modifications).
- 20% of local programs serve a mostly or exclusively rural community.



SERVICE OFFERINGS

Prior to beginning our work on the Comprehensive Network Study, we knew anecdotally that local programs were delivering many different types of programming to bolster the typical Meals on Wheels service. As part of the preliminary design work for the study, we confirmed this by speaking to a number of programs and surfacing dozens of unique services they offer. From nutrition to snow shoveling to legal action and advocacy services, these programs provide a wide variety of services to seniors that support independent living and aging in place in their own communities. For this research effort, we then narrowed this long list to the 19 services listed below. However, we know this undoubtedly underrepresents the breadth, depth and diversity of local Meals on Wheels program offerings.



NUTRITION

- Home-delivered meals
- Congregate meals
- Medical meals
- Nutrition education
- Nutrition counseling
- Nutrition assessments
- SNAP application assistance
- Coordination of USDA Food Assistance programs
- Meal packs upon hospital discharge
- Grocery assistance / delivery

IN-HOME SAFETY

- In-home assessments
- Safety programs
- Home repair programs
- Medication management

SOCIALIZATION

- Senior companion services
- Telephone reassurance
- Pet assistance and/or pet food delivery

COMMUNITY CONNECTIONS

- Care coordination
- Transportation



NUTRITION OFFERINGS

Meals on Wheels programs provide consistent access to high quality nutrition services to meet seniors' nutritional needs, a vital component of ensuring their health and well-being to support their ability to remain independent and in their own homes.

NUTRITION OFFERINGS EXPLORED IN COMPREHENSIVE NETWORK STUDY

- Home-delivered meals
- Congregate meals
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- Nutrition counseling
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- SNAP application assistance
- Coordination of USDA Food Assistance programs
- Meal packs upon hospital discharge
- Grocery assistance/delivery

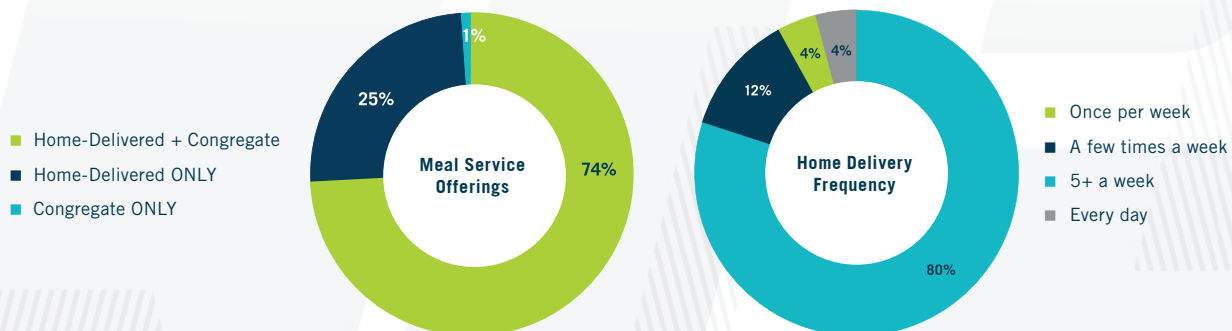
WHAT WE FOUND

Nearly all local Meals on Wheels programs offer direct nutrition services to seniors – often via multiple types of nutrition services – however, meals are clearly the core nutrition offering. (Note: Not all of the local programs surveyed are direct service providers [e.g., Area Agencies on Aging, State Units on Aging], accounting for the small percentage of programs that do not offer direct nutrition services to seniors.)

HOME-DELIVERED MEALS

Home-delivered meals are hot and/or cold meals that are provided to primarily homebound individuals on a regular basis. Virtually all local programs – 97% – offer home-delivered meals.

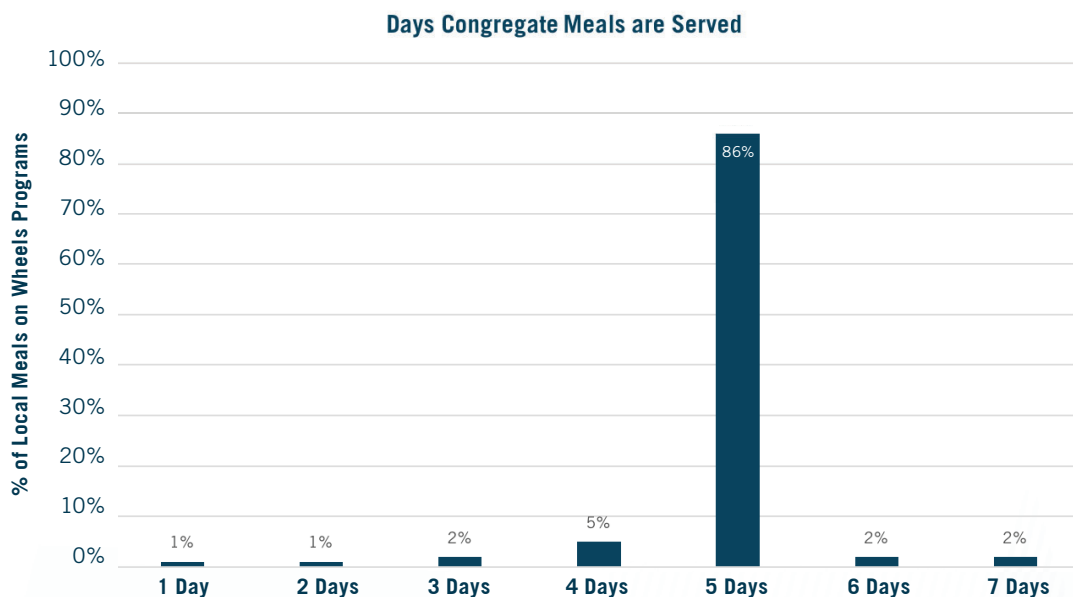
- Lunch is the most common home-delivered meal, though breakfast and dinner may also be served in some communities.
- The vast majority of local programs provide visits/meal deliveries at least five days a week.
- More than 40% of local programs provide at least five minutes of client interaction per visit.
- Most delivery routes are under 25 miles, but some are significantly longer (50-100+ miles).
- Nearly all local programs leverage volunteers for delivery (>85%), although many also use a combination of volunteers and paid drivers.



CONGREGATE MEALS

Congregate meals are hot and/or cold meals that are regularly provided to more mobile individuals in some type of group setting, such as a community center or adult day care facility. Most local programs – 74% – offer both home-delivered and congregate meals.

- Local programs usually have more than one congregate site (73% have multiple).
- Collectively, local programs managed more than 5,000 congregate meal service sites nationwide.
- Most congregate programs are offered five days per week (90%).





SAFETY OFFERINGS

Meals on Wheels programs are a first line of sight and action for identifying and mitigating potential dangers and falls risks, helping seniors feel more safe and secure in their homes.

SAFETY OFFERINGS EXPLORED IN COMPREHENSIVE NETWORK STUDY

- In-home assessments
- Home repair programs
- Safety programs
- Medication management

WHAT WE FOUND

In addition to generally acting as “eyes and ears” in the home when delivering meals, two-thirds of local programs also offer at least one formal safety program, either directly or by contracting out/referrals. Below is a closer look at the two most common formal safety offerings from local Meals on Wheels programs:

IN-HOME ASSESSMENTS

In-home assessments are a core component for most local programs. These are systematic, detailed assessments of the client and their living situation used to provide information to guide the scope of services the client may receive moving forward.

- Local programs may offer in-home assessments either directly or by subcontracting/contracting.
- Of those local programs that provide in-home assessments, 82% do so upon client enrollment and then at a set interval after that. Virtually all use a standardized format for in-home assessments and recordkeeping, ensuring clients are evaluated consistently.

HOME REPAIR PROGRAMS

While in clients' homes regularly, Meals on Wheels programs are often the first line of sight for an issue in the home. Providing home repairs to resolve these issues can enable peace of mind for clients and their families.

- Home repair is offered/overseen by about one-third of local programs, while another one-third refers clients to other providers for these services.
- Home repair programs – directly provided or referred – served more than a projected 18,000 seniors in 2018 alone.
- Most home repair programs are fairly small, serving fewer than 100 clients.





SOCIALIZATION OFFERINGS

Meals on Wheels programs provide clients with regular companionship opportunities to help promote socialization and reduce social isolation and loneliness.

SOCIALIZATION OFFERINGS EXPLORED IN COMPREHENSIVE NETWORK STUDY

- Senior companion services (e.g., Friendly Visitor services)
- Pet assistance and/or pet food delivery
- Telephone reassurance

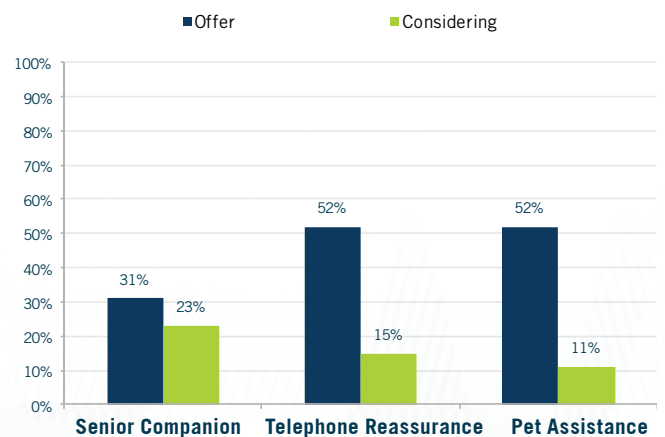
WHAT WE FOUND

SOCIALIZATION PROGRAMS

Formal socialization programs explored through this study – **which offer opportunities for social interaction beyond those that occur with regular meal deliveries and congregate meal gatherings** – are less common than other types of programming offered by local programs (nutrition, safety, community connections).

- Pet assistance and telephone reassurance programs are the most common formal socialization programs, with just over half of local programs offering them.
- Most of those with pet programs offer a multi-pronged pet assistance program, meaning they may offer a variety of services and/or supplies (e.g., food/treats, supplies/litter, vet care, grooming).

Socialization Offering Summary





COMMUNITY CONNECTIONS

Meals on Wheels programs act as the regular “eyes and ears” that can monitor older adults’ needs as they change – including changes in physical, mental or environmental condition – and connect them to additional services and supports within the community, as necessary.

COMMUNITY CONNECTION OFFERINGS EXPLORED IN COMPREHENSIVE NETWORK STUDY

- Care coordination
- Transportation

WHAT WE FOUND

Community connection offerings from local programs tend to be affiliated/referrals more than direct offerings.

COMMUNITY CONNECTION PROGRAMS

- Nearly half of our local programs offer a variety of care coordination and transportation services to their senior clients.
- Larger, government-affiliated Meals on Wheels programs are significantly more likely than others to provide formal care coordination to all of the seniors they serve, while smaller independent programs are the least likely to offer this service.
- To meet their clients’ needs, local programs tap into their unique community make-up to deliver a holistic approach to care, and 59% are looking to extend their current service offerings.



CHALLENGES AND INSTITUTIONAL BARRIERS FOR THE NETWORK

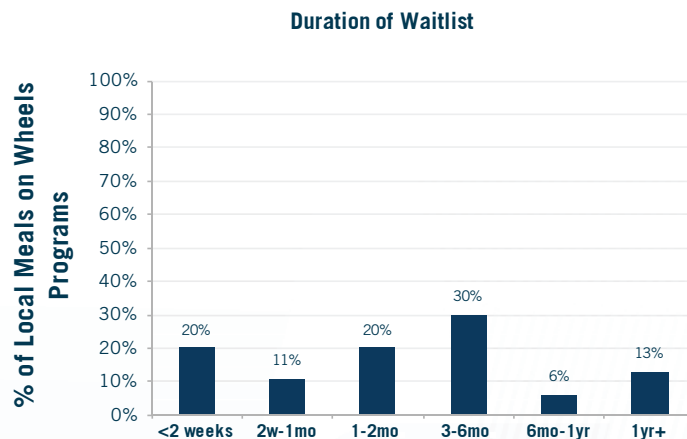
Across programs of different sizes, locations and capacity, a few key shared challenges arose that local programs are working to navigate and overcome. Gaining a clearer understanding of these challenges can help steer Meals on Wheels America's work for and with our membership moving forward.

FUNDING LIMITATIONS IMPACT CAPACITY

- No local Meals on Wheels program has enough money, regardless of its budget size.
- Only one-third of local programs believes it is serving meals to just about everyone who needs them.

WAITLISTS

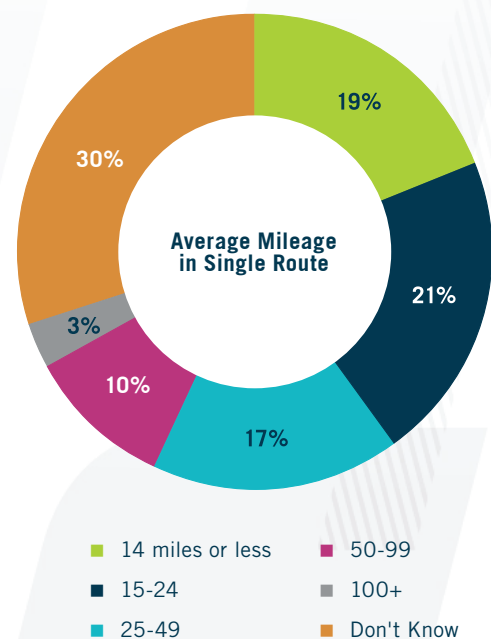
- Roughly half of local programs have a documented waitlist for home-delivered meals.
- The duration of the wait varies widely across local programs. While the average wait for service is four months, 13% of local programs have waitlists longer than a year.



- Most local programs cite funding as the primary reason for their waitlist.
- The duration of the wait likely precludes many seniors from signing up in the first place, so using waitlist size as a proxy for unmet need likely underrepresents that need significantly.

WIDESPREAD GEOGRAPHY

- Most delivery routes take more than an hour, and some can take more than an hour and a half.
- Some local programs drive more than 50-100 miles per route.
 - Longer delivery routes may make it more difficult to recruit regular volunteers, as they may not be able to meet the necessary extended time commitment. Plus, longer routes can incur higher gas costs and more wear-and-tear on vehicles, whether program- or volunteer-owned.

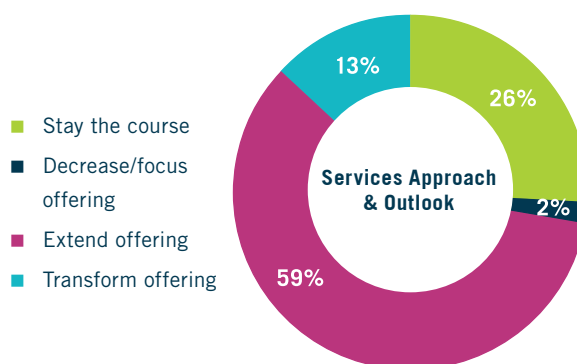


SUCCESSSES AND OPPORTUNITIES

Just as with challenges and barriers, we found that local programs across our membership are united in their overall goals and mission, committed to serving seniors more than just a meal. They share a number of common success stories and similar opportunities that can be leveraged to propel the network in the years to come.

LOOKING TO GROW

- Most local programs are growth- and transformation-oriented, regardless of program size.
- While 60% of local programs already offer at least six different service programs, nearly three-quarters are looking to grow or transform their offerings/services in either breadth, depth or both.
- Growth orientation is not limited to local programs with larger budgets.
- Local programs are incredibly receptive to paid contracts for service, partnerships to support serving their clients and participating in studies that quantifiably demonstrate the impact we all know they are having in their local communities. Furthermore, local programs are looking to institutionalize the needed internal capacity and capabilities to engage in new ways, such as becoming HIPAA compliant and having licensed/credentialed staff.



READY AND ABLE TO DO MORE...WITH MORE FUNDING

- Local programs have the capacity, staffing, meal production, credentials and processes to serve more clients and address the unmet needs of their communities.
 - Capacity includes a large volunteer base across membership, which is often leveraged for meal prep, delivery, social support programs and overall program support.
- 90% of local programs could take on 10% more clients with relative ease, provided there was funding that came with the new clients. 55% said they could do this very easily.

DATA ABOUNDS

- Local programs already collect a lot of data on the seniors they serve – health-related and otherwise. This data is collected and stored in a variety of ways across membership, presenting a huge opportunity for local programs to hone and grow their data collection methods/practices to help inform their services and programming moving forward.

LOCAL MEALS ON WHEELS PROGRAMS WANT TO LEARN FROM EACH OTHER

- Most local programs are looking to meet, collaborate with and learn from others in a more intimate way.

CONCLUSIONS

The *More Than a Meal*® Comprehensive Network Study affirms that local Meals on Wheels programs, as a collective, operate as a closely knit network across community, state and regional boundaries. It highlights the fact that Meals on Wheels America members share the same important core offerings – nutrition, safety, socialization and community connections – and are developing a wide variety of related programs that serve seniors and support independent living.

While local programs' size and budgets impact their scale, their aspirations are not restricted by these limitations. Most want to grow in size and/or scope of services offered, with 75% looking to grow or transform their offerings in an effort to meet the needs of their senior clients. Yet, no one has enough money. Local programs expressed strong interest in establishing partnerships for efficacy studies that will help prove the impact of their services, and nearly two-thirds is interested in pursuing healthcare system partnerships. This speaks to a level of organizational savvy to be able to better serve a growing older adult population. As a whole, these programs are doing a lot in the day-to-day and are looking to extend their client base and their offerings, where possible. **In fact, most have the capacity to serve more people than they do today, if they can secure additional funding.**

Above all, the *More Than a Meal*® Comprehensive Network Study verifies that local Meals on Wheels programs are tightly aligned behind common core service offerings and a passionate mission of supporting seniors through so much more than just the nutrition they need to remain healthy at home and in their communities, where they want to be.

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**EACH INDIVIDUAL MEALS ON WHEELS PROGRAM REPRESENTS
ONE SLICE OF THE MOST POWERFUL NATIONAL NETWORK
SERVING SENIORS IN AMERICA.**
.....

-ELLIE HOLLANDER, PRESIDENT AND CHIEF EXECUTIVE OFFICER, MEALS ON WHEELS AMERICA





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