

2021 MEMBER PERSPECTIVES AND PRACTICES SURVEY: PUBLIC SNAPSHOT

This research effort, the 2021 Member Perspectives and Practices Survey, built upon the foundation laid by the [2019 More Than a Meal® Comprehensive Network Study](#) and the [2020 COVID-19 Member Impact Study](#).

UNDERSTANDING MEMBERS TWO YEARS INTO A GLOBAL PANDEMIC

Meals on Wheels America and Trailblazer Research embarked on a multi-pronged study in 2021 designed to build on previous research efforts to provide an updated and actionable understanding of local Meals on Wheels programs' needs, practices and beliefs at the time the research was conducted, as well as their interests and visions for the future. This study included a quantitative survey of the full Meals on Wheels America Membership, of which 503 – or nearly half of all – Member programs (Members) responded, representing all regions of the country and a variety of program budget sizes. The survey was conducted between November 8-December 3, 2021 and was supplemented with a series of free response exercises, four focus groups with participants from 18 Member programs and in-depth interviews with three programs to round out and add to this body of work. The information gathered is informing Meals on Wheels America's strategies to support the continued success and longevity of Members moving forward.

The remainder of this summary shares research highlights and key insights surfaced through the 2021 Member Perspectives and Practices Survey.

MEMBERS AT A GLANCE

Members were capable and eager to serve more seniors the full Meals on Wheels Service Model™. They were looking toward future opportunities with growth-oriented, collaborative mindsets, though they also acknowledged a number of challenges and constraints that may limit their ability to expand their services in the ways they want to, including the COVID-19 pandemic.

- **Members believed their work – nutrition services and other impactful ancillary programs – matters.**
 - 97% agreed that seniors were happier, and 97% agreed that seniors were healthier, because of the services they provide.
 - 98% agreed it is important that they provide more services and support than solely meals to their senior clients.
- **Members were generally looking to grow.**
 - Two in three Members wanted to grow their offerings, services and/or programs in breadth or depth.
- **A number of challenges and constraints were prevalent among Members looking to sustain and grow their services.**
 - Frequently reported challenges for Members included manpower to deliver meals (63%) and needing help with corporate funding or partnerships (61%).
 - 40% felt constrained in their options or ability to make changes due to rules dictated by their funding sources.
 - 32% indicated supply chain issues having an impact on securing enough food. *(It should be noted that this fieldwork was conducted in November 2021, and this issue may have grown more pervasive since.)*

- **Members had continued to serve those in need of services throughout the pandemic.**
 - 82% were still providing more home-delivered meals than they were before the pandemic; and 42% were still serving 50% more home-delivered meals than they were pre-COVID.
 - 75% said they had innovated in ways that would change their business practices forever, figuring out things like how to continue services without interruption, how to provide meals more efficiently and other innovations.
 - 65% said they were better connected to partners in their community.
 - COVID-19 provided a temporary financial boost for some Members, with 38% in a better financial position than they were pre-pandemic. On the flip side, one in five (18%) were in worse financial shape – in fact, 15% depleted their cash reserves during the pandemic/don't have 3-6 months of cash in reserves.
 - Looking ahead, Members said they would be focused on ways to keep their clients engaged, recruiting new volunteers, rebuilding staffing capacity and more.

THE UNMET NEED

Members shared that they can serve many, and they can serve more. However, reaching all seniors who need meals will be constrained by funding and capacity limitations.

- **Members believed there were more seniors in their communities who would benefit from nutrition services who they were not currently serving.**
 - 97% believed there were seniors in their community who needed meals who they were not currently serving.
- **Even at elevated service levels, many Members were confident they could still do more and were building the capacity to do so.**
 - Most Members (69%) felt confident that they would be able to serve 10% more seniors in the next two to three months following the survey, assuming there was funding available to support them – even as eight out of 10 were already operating at higher volumes than prior to the pandemic.
 - 73% were focused on growing capacity to serve unmet needs in their community.
 - 80% were trying to reach more vulnerable clients, especially those groups who are particularly marginalized and/or disenfranchised.
- **Members struggled to access seniors who were not currently being served for a variety of reasons.**
 - 61% cited reaching new/potential clients as a major limitation(s) to serving meals to all seniors in their community who need them.
 - 59% cited funding to pay for the meals as their most significant challenge to meeting the need for nutrition services.
 - Other limitations that Members saw as impeding their ability to serve seniors they are not currently serving included: capacity to deliver and produce meals, infrastructure (e.g., staffing, equipment, facilities), access to unserved seniors, restrictions associated with funding requirements and competition.

NUTRITION SERVICES

96% of Members provided nutrition services directly to clients¹, nearly all of which offer home-delivered meals. Members believed clients were mostly satisfied with the meals they received, but they were still working to grow the breadth of their offerings and align them to clients' nutrition needs and preferences.

¹ Survey data about nutrition and supportive services are based on responses from the 96% of Members that provide direct services and exclude the four percent that do not provide direct services.

49% of Members provided or planned meals that were customized to meet clients' medical needs, and 55% provided some type of meal options.

- **Meal services were predominant, but they were often not the only program offered.**
 - 43% said that meals are only a part of what they do, representing just one of two or more programs offered and not the lead program.
 - 79% provided four or more extra nutrition-related services, such as emergency meals, grocery delivery services and meal packs upon hospital discharge.
- **Members were serving elevated home-delivered meal volumes compared to before COVID-19.**
 - Though service growth peaked during the summer of 2020 and has steadily decreased since then, 82% of Members were still serving more home-delivered meals than pre-COVID at the time of the survey.
 - 92% increased their home-delivered meal volumes by at least 10% at some phase of the pandemic.
 - Most Members (89%) provided at least 75% of their clients with five meals per week. 66% of those Members serving less than five meals per week cited client preference as the exclusive reason.
- **Congregate meal programs were back in business.**
 - 83% of congregate programs were now offering traditional congregate services; 56% of these programs were also offering grab-n-go as part of their traditional congregate services.
 - 77% of those offering congregate services indicated that they were doing so five or more days per week.

SUPPORTIVE SERVICES

Members were promoting social connection, safety and community connections – the Meals on Wheels Service Model™ – and no service was ever mutually exclusive. Members believed the seniors they serve were positively affected by their efforts.

- **Members provided clients with social connection via regular meal deliveries and through ancillary programs.**
 - 98% socialized with clients through their services, via staff and volunteer engagements, with other seniors and/or with others in the community.
 - 94% offered at least one social connection program of interest, such as telephone calling programs, pet assistance services, group activities, friendly visiting programs and household chore assistance.
 - 95% believed seniors clients were less lonely because of their work.
 - 89% trained their volunteers to chat with senior clients, while 82% trained volunteers to adjust interactions to match client needs.
 - At most programs (63%), drivers spent at least five minutes with each client as part of meal delivery.
- **Members delivered on safety.**
 - 99% trained their drivers to monitor for safety hazards and needs in a variety of ways, including: keeping an eye out for safety issues around the clients' home environments; monitoring the client' well-being and general health; and noting conditions of their senior clients that may warrant attention.
 - 98% believed their senior clients were able to stay home more safely because of their work.
 - 55% provided safety-related services via offering supportive/updated devices and appliances (e.g., mobility devices, fans) and/or offering home repair and modification services.

- **Members delivered on community connections.**
 - 88% connected seniors to additional services when those needs were identified by connecting the senior or their caregiver directly with the appropriate service and/or by leveraging an internal service offering to address the need at hand.
 - 87% agreed that they were able to help seniors acquire the additional resources they needed.

FUNDING

Members had fairly diversified revenue streams, receiving funding from a variety of sources, including the federal, state and/or local government; Medicare/Medicaid; healthcare contracts for service; client contributions; donor funding; grants from non-governmental organizations; and/or other sources.

- **Most Members received funding from several sources.**
 - 99% leveraged more than one funding sources, while two in three had more than three funding sources.
 - Government funding was the most common and often represented a large share. As reliance on government funding went up, so did the likelihood of having depleted reserves.
 - Healthcare contracts were a growing share of revenue, with roughly one in five Members having at least one, though many more Members are interested in pursuing them.

KEY INSIGHTS

Looking forward, Members have internalized the mindset of being **flexible, adaptable and responsive to new opportunities**. They believed in their work and that their capacity and impact had grown and can continue to grow and overcome various challenges with support from a **collaborative network**. They were improving their processes to eliminate waste and operate more efficiently. In their new agile shoes, they were **ready to grow their capacity** for collection and use of data, as well as being ready to **expand** their services and **reach more** underserved and/or unserved clients in their community – which can happen if they can find enough drivers and volunteers in a job market that is increasingly competitive and enough food to meet the need in a global supply chain crisis.

Through the **Meals on Wheels Service Model™**, Members have been meeting the needs of those they serve and making an impact every day.

OVERCOMING CHALLENGES, INNOVATIVE PRACTICES + A STEADFAST MISSION

This comprehensive research effort has helped Meals on Wheels America to better understand Members' more immediate needs and practices while also taking a look at what Members are hoping to pursue in the future as the pandemic and a number of other factors continue to alter capacity and operations. Though the tactics they pursue throughout this year and beyond may not be what Members had once predicted, **their overall mission – to provide nutrition and more to seniors – remains solid and unchanged**.