



HIGHLIGHTS FROM 2021 MIDYEAR NETWORK PULSE SURVEY

MEALS ON WHEELS AMERICA

EXECUTIVE SUMMARY (P. 1 OF 3)

About the Survey

258 Members (24%) completed at least some questions on the July 2021 14-question midyear pulse survey. Where data matched, we combined data from this survey with data from the November 2020 Member survey to examine changes over time for questions that were asked on both surveys.

Programs Still Providing More Home Delivered Meals to More Clients.

As of July 2021, programs were still delivering more home-delivered meals and serving more home-delivered clients than they were before the pandemic began. Home delivery volume remains high compared to before COVID-19 and close to the increases reported in November 2020.

| Topic | Average growth from pre-COVID-19 to “highest point” for program | Ave. growth pre-COVID to 11/2020 | Ave. growth pre-COVID to 07/2021 |
|-------------------------------|--|----------------------------------|----------------------------------|
| Home delivery CLIENTS/SENIORS | 07/2021 survey: 69% increase in HD CLIENTS 11/2020 survey: 84% increase in HD SENIORS | 60% increase HD SENIORS | 44% increase in HD CLIENTS |
| Home delivered MEALS | 07/2021 survey: 101% increase in HD MEALS 11/2020 survey: 100% increase in HD MEALS | 59% increase in HD MEALS | 57% increase in HD MEALS |

Congregate Programs Continue To Adapt.

Many congregate programs continue to be open in a drive-thru or pick-up type format (43% in 07/2021, 66% in 11/2020) and/or have shifted congregate clients to home delivery (26% in Jul, 45% in Nov).

EXECUTIVE SUMMARY (P. 2 OF 3)

Among Members with Waitlists, Waitlists Have Declined Somewhat.

Consistent with the November 2020 survey, most Members who completed the survey said they do not keep a waitlist. 65% said they do not keep a waitlist because they provide services to everyone who qualifies and 7% said they do not keep a waitlist by choice or policy. 28% of Members said they do keep an HD waitlist. Among the 39 Members who reported people on waitlists before COVID-19, on average 25% fewer people were on their waitlists in July 2021 than before COVID-19.

Programs Have Tapped Resources.

- 47% of programs said they had tapped local partnerships to help fill gaps, provide emergency meals, etc.
- 47% said they had relied on Meals on Wheels America COVID-19 grants to continue operations
- 25% said they had pulled resources from other services/programs in order to support the need for nutrition services.
- 5% said they had eliminated or nearly eliminated their reserves

EXECUTIVE SUMMARY (P.3 OF 3)


Emergency Funding Flexibilities Have Been Helpful.

83% of programs said they had received any federal emergency funding. 83% said that they had used one or more federal funding flexibilities and it had been helpful.

Yet Seniors Could Lose Services If Funding Is Not Continued, Or Already Have.

- Nearly half (48%) of programs said they would not be able to support their current client base without continued infusions of cash beyond our typical reimbursements, contracts, etc.
- 23% said that emergency federal funding had helped them serve some new clients; they discontinued services to them when that funding ended.

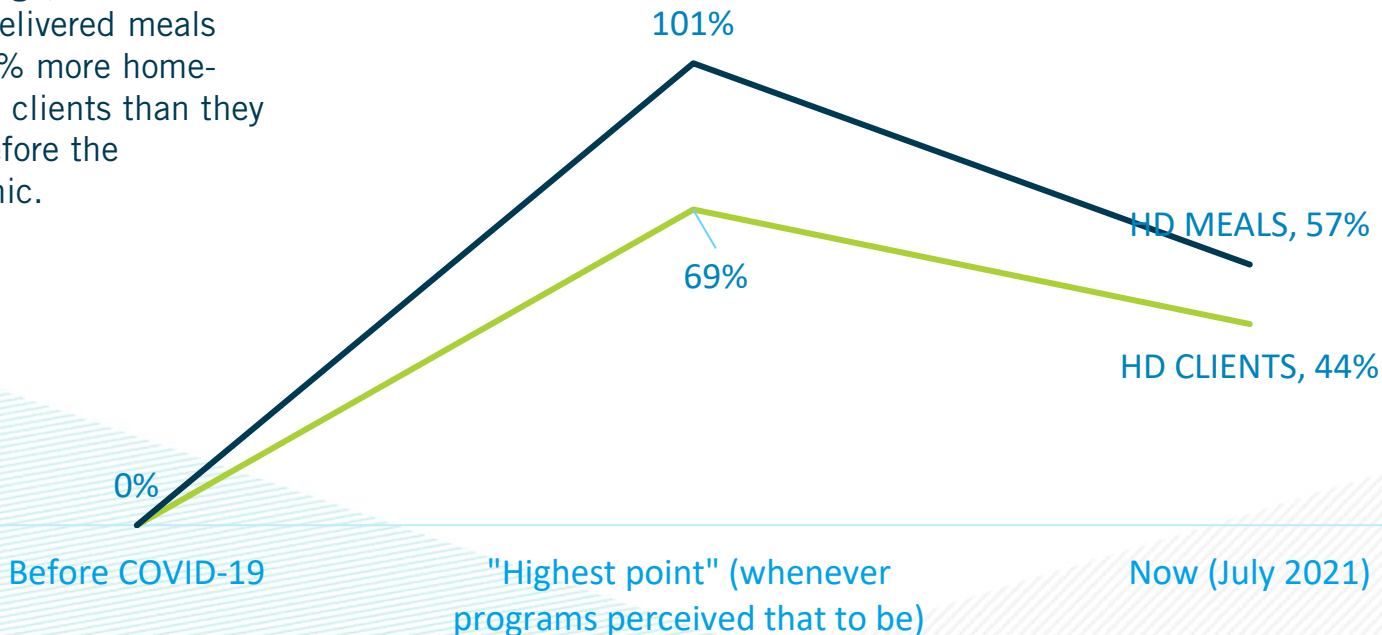
HOME DELIVERY

America the Beautiful
PLEASE USE
WIPES BEFORE
COMING INSIDE
THANK YOU!!


PROGRAMS STILL SERVING MORE HOME-DELIVERED MEALS TO MORE CLIENTS THAN BEFORE COVID-19

As of July 2021, programs were serving, on average, 57% more home-delivered meals and 44% more home-delivery clients than they were before the pandemic.

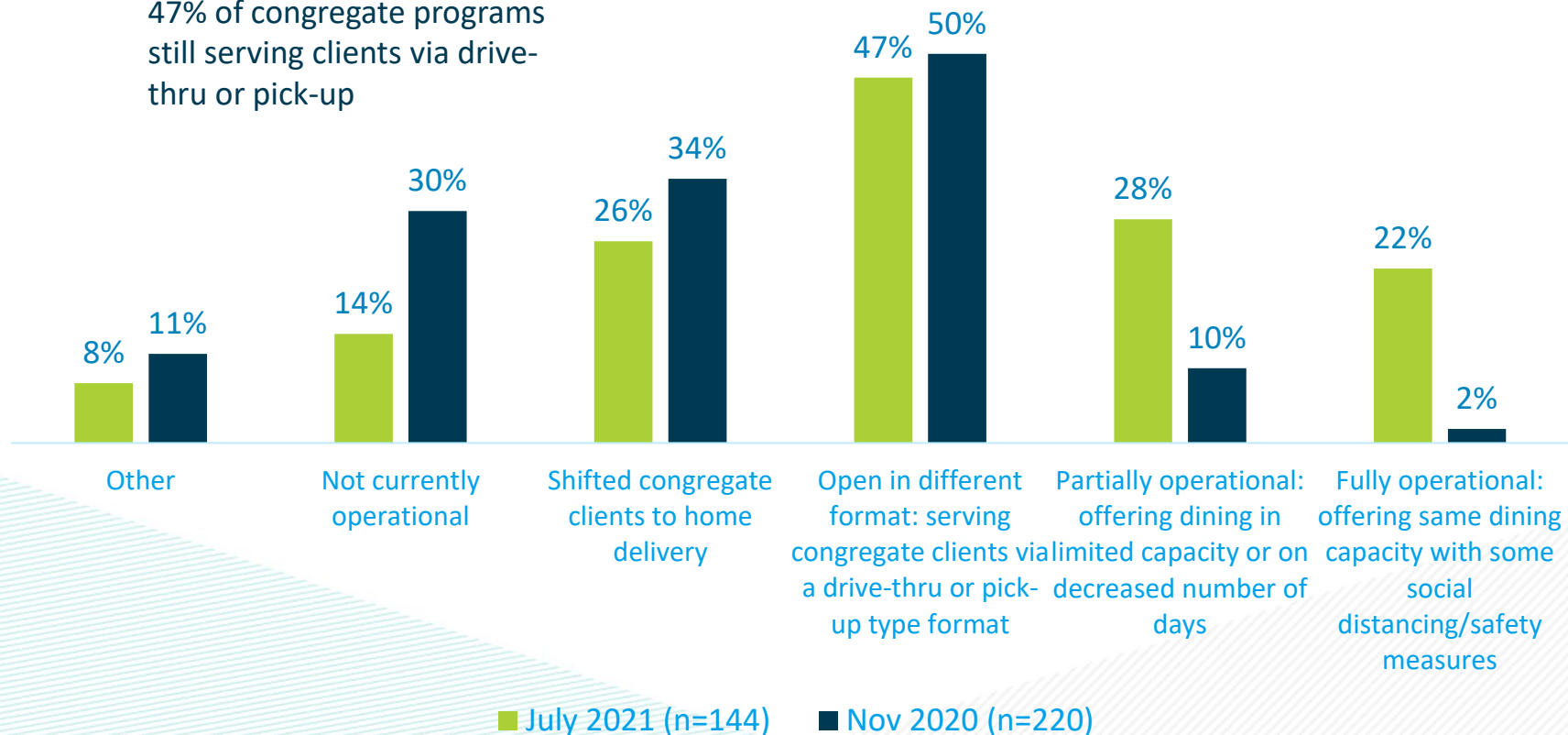
Average Changes in Home Delivery



CONGREGATE

CONGREGATE PROGRAMS CONTINUE TO ADAPT

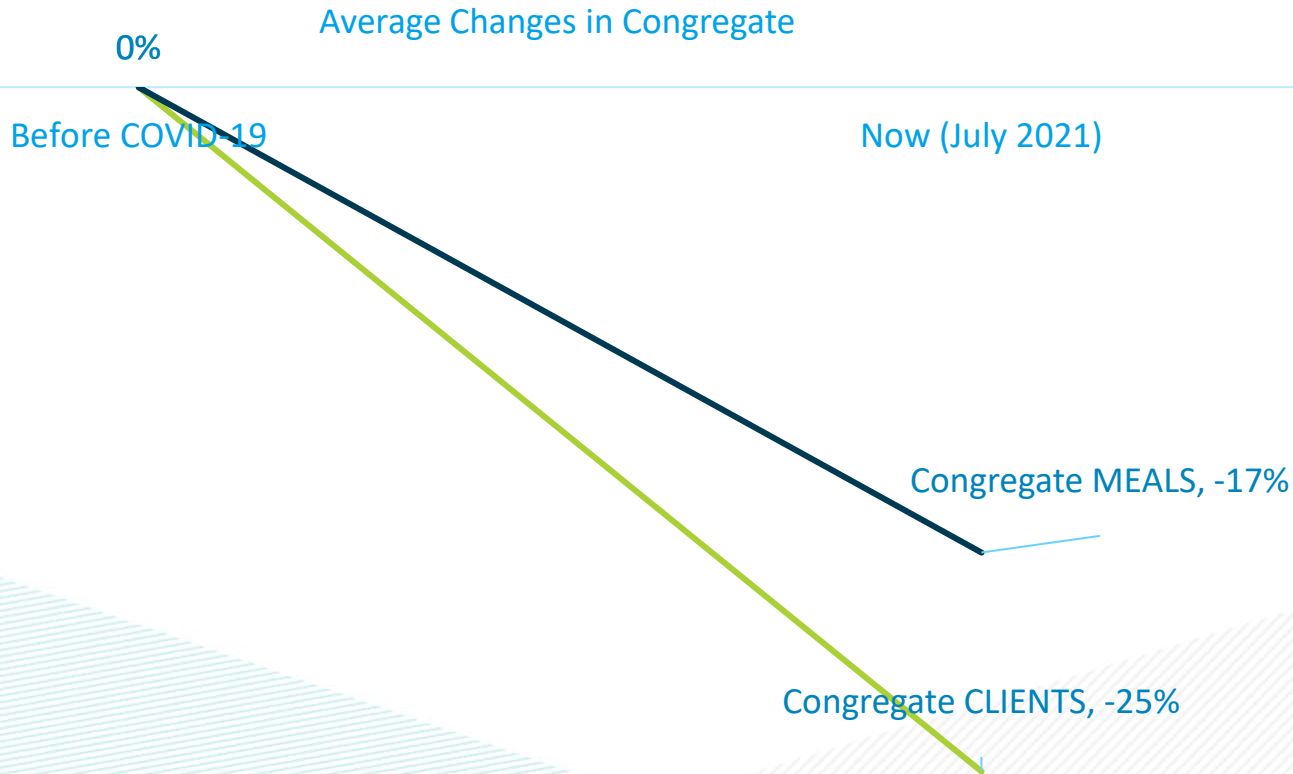
47% of congregate programs still serving clients via drive-thru or pick-up



EXAMPLE QUOTES: OTHER WAYS OF PROVIDING CONGREGATE

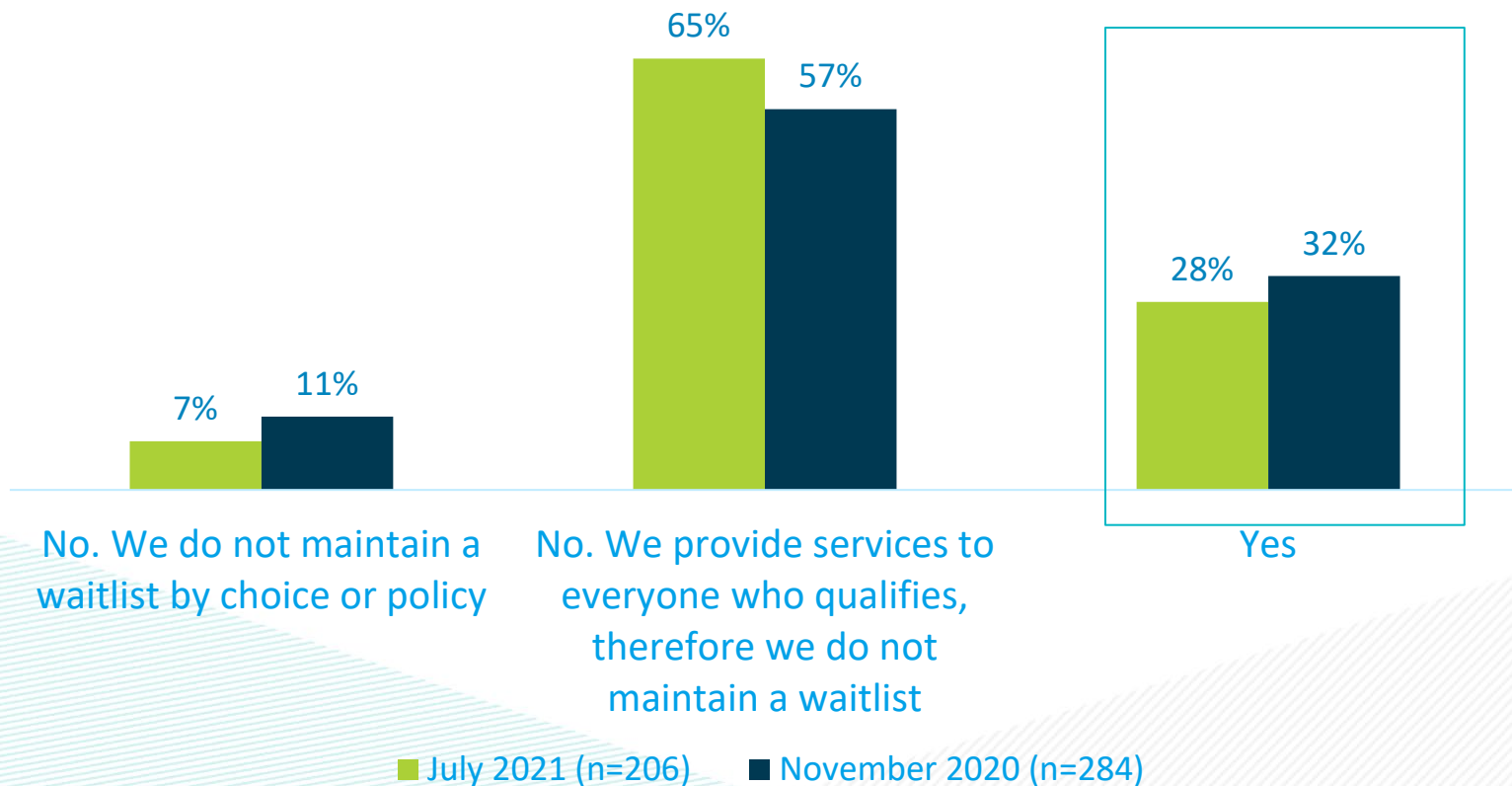
- “Open for dine-in unmasked for vaccinated clients only; pickup available for unvaccinated clients”
- “Fully functional: serving in both dining capacity and meals to go.”
- “Also offering pick-up format”
- “All centers are open for social activities. Six of twenty have daily meal service. Meals are pre-plated rather than delivered in bulk.”

PROGRAMS SERVING FEWER CONGREGATE MEALS AND CONGREGATE CLIENTS THAN BEFORE COVID-19

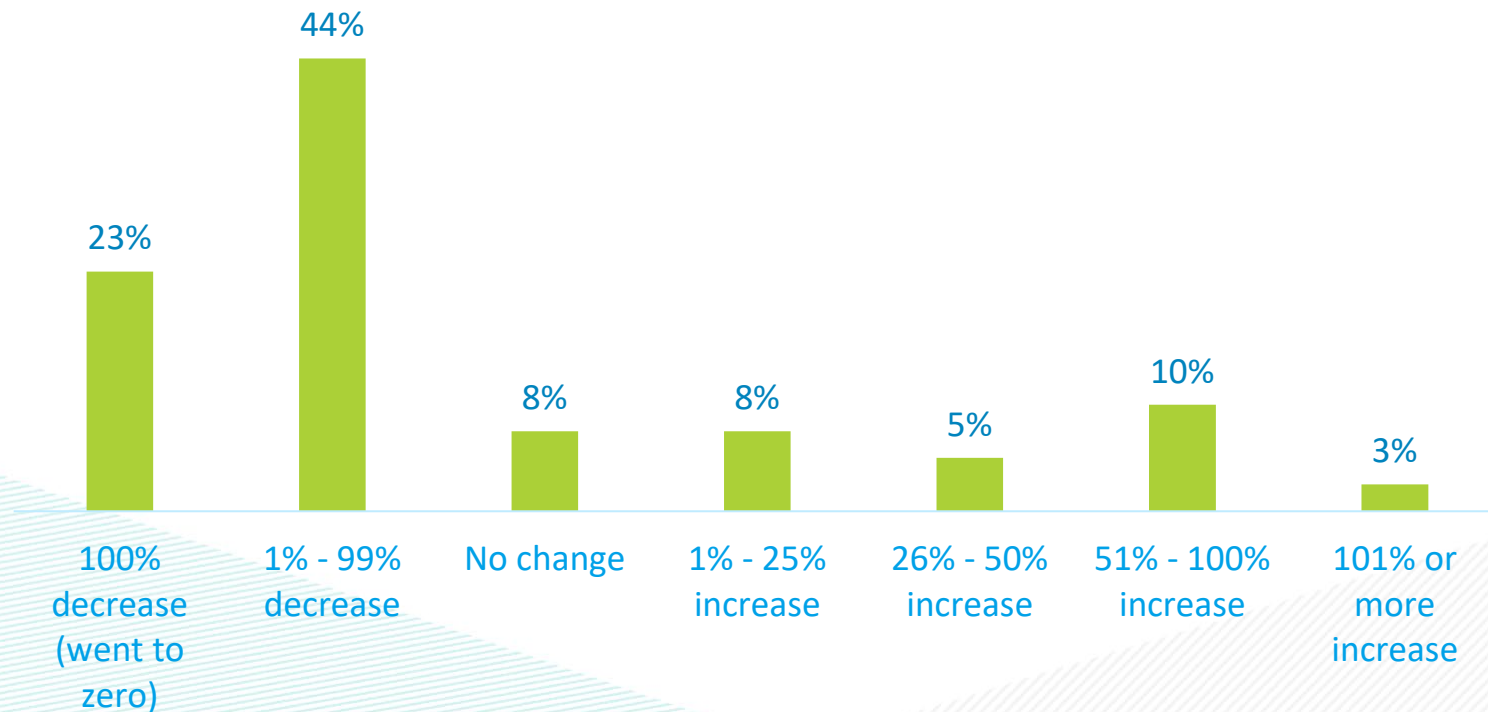


WAITLISTS

28% OF MEMBERS KEEP A HOME DELIVERY WAITLIST



OF THE 39 PROGRAMS THAT HAD PEOPLE ON WAITLISTS BEFORE COVID-19, 67% REPORTED A DECREASE IN WAITLIST SIZE

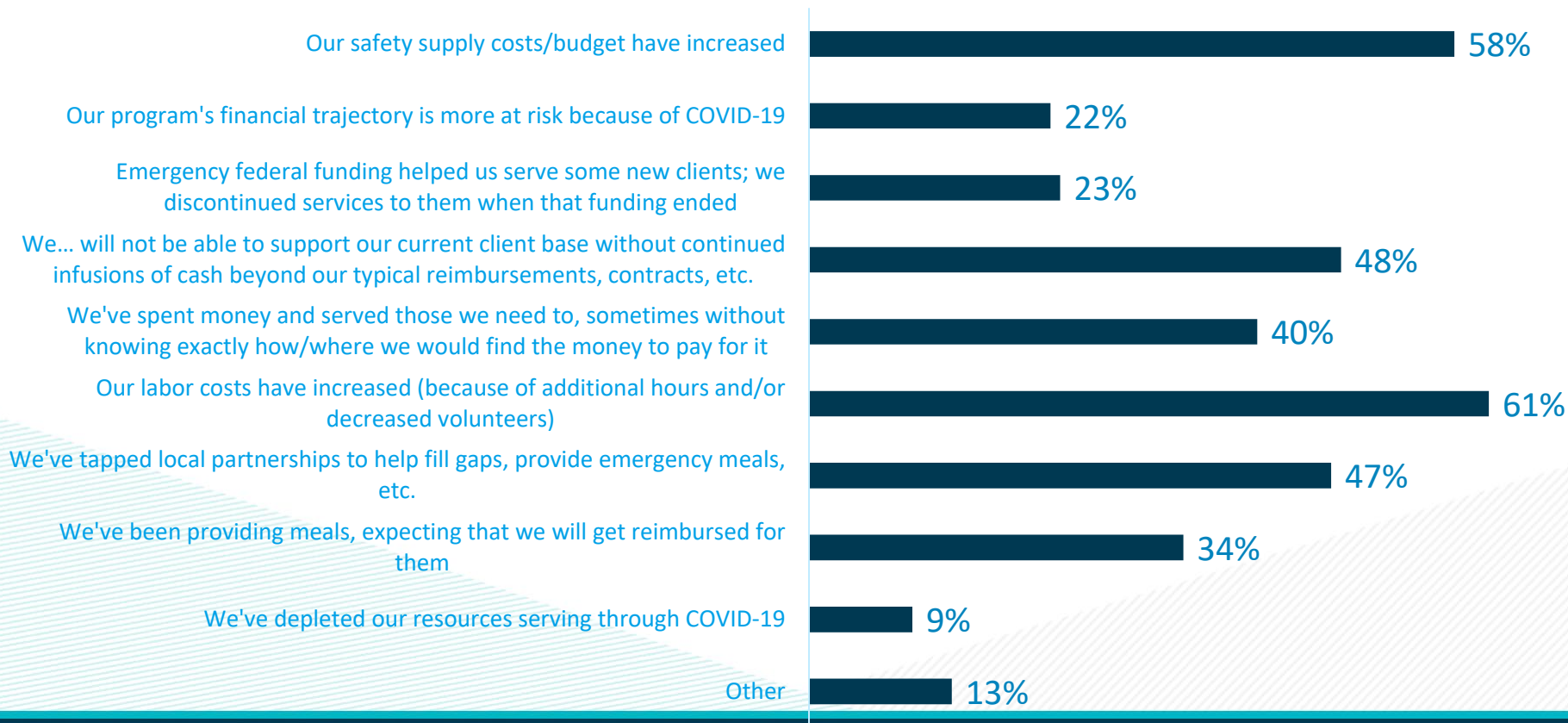


Calculated from July 2021 survey Q11. *How many people were on your waitlist before COVID-19, at the height of COVID-19, and today?* (n=39)

PROGRAM FINANCES AND EMERGENCY FUNDING

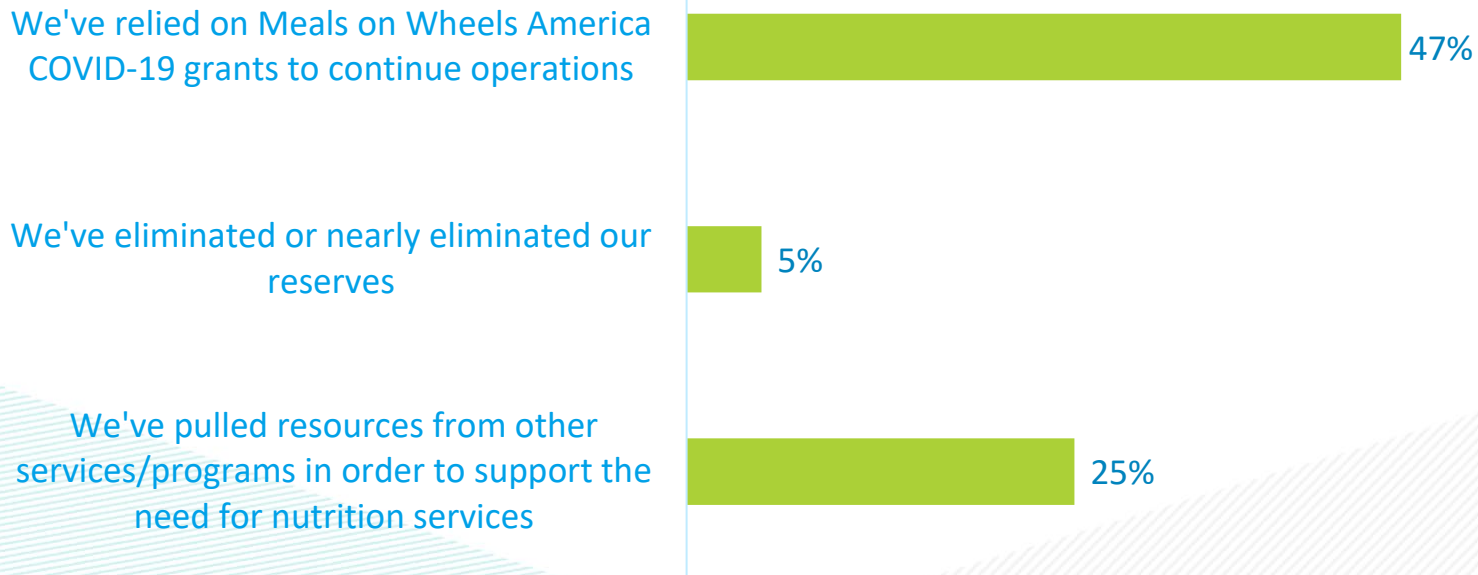
ADDITIONAL COVID-19 IMPACTS

July 2021 (n=225)



COVID-19 IMPACTS, CONTINUED

July 2021 (n=225)



STATUS OF FEDERAL EMERGENCY RELIEF FUNDING: *ALL PROGRAMS*

83% of programs had received any federal emergency funding

CARES Act



Families First



Other supplemental federal emergency relief funding



American Rescue Plan Act funding



- No, and have NOT received information about when we will receive funding
- No, but HAVE received information about when we will receive funding
- Yes, and we are still currently using these funds
- Yes, but the funds have all been exhausted

N=177-201, excluding don't know or not applicable.

STATUS OF FEDERAL EMERGENCY RELIEF FUNDING: *PROGRAMS THAT ARE NOT SUAs OR AAAs*

83% of programs that are not AAAs or SUAs had received any federal emergency funding

Other supplemental federal emergency relief funding

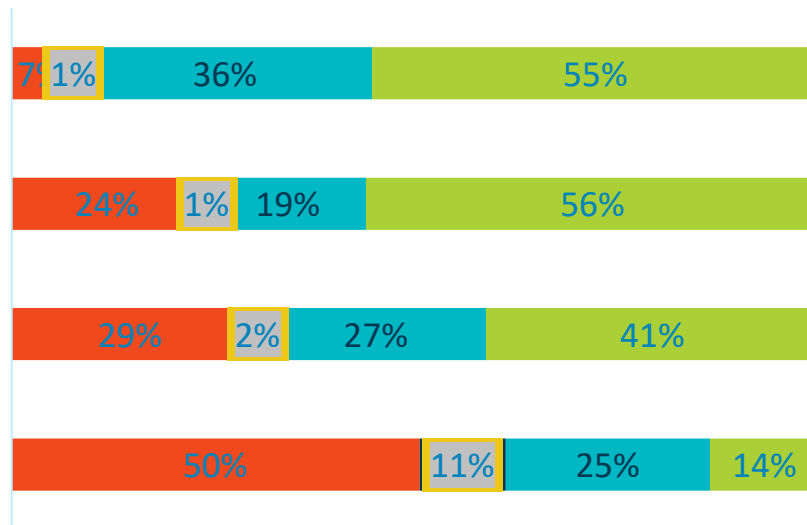
American Rescue Plan Act funding

CARES Act

Families First

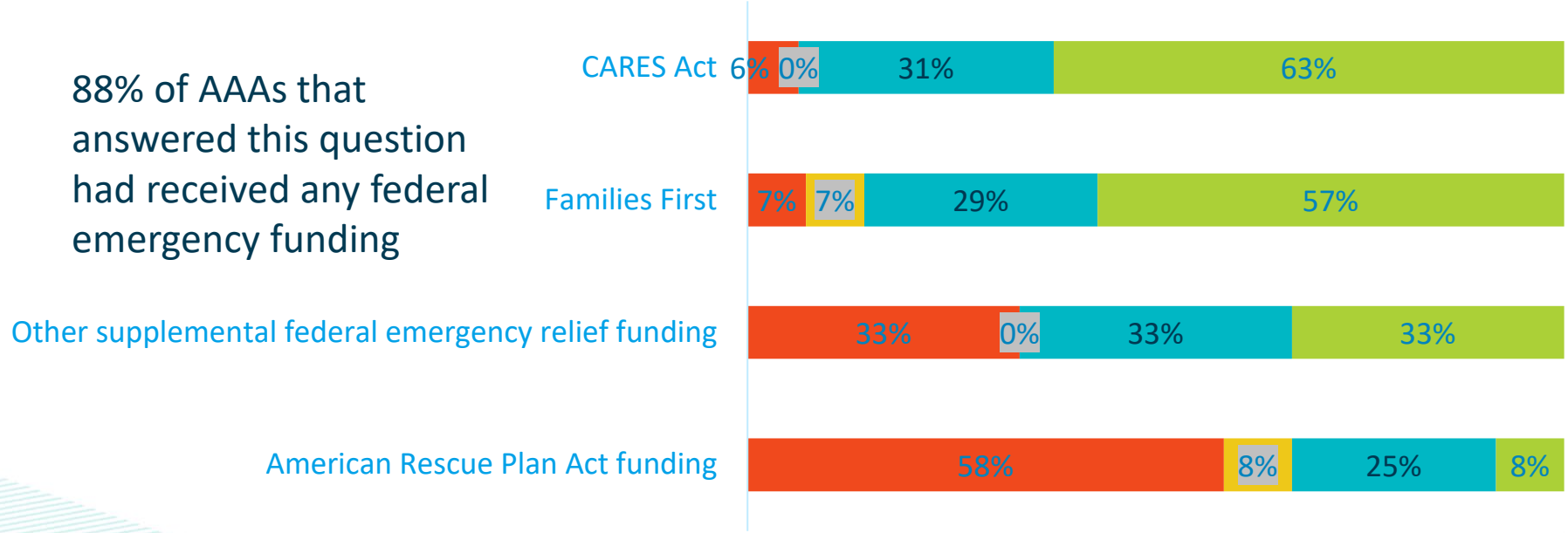
- No, and have NOT received information about when we will receive funding
- No, but HAVE received information about when we will receive funding
- Yes, and we are still currently using these funds
- Yes, but the funds have all been exhausted

N=92-157 excluding don't know or not applicable.



STATUS OF FEDERAL EMERGENCY RELIEF FUNDING: AAAs

88% of AAAs that answered this question had received any federal emergency funding



- No, and have NOT received information about when we will receive funding
- No, but HAVE received information about when we will receive funding
- Yes, and we are still currently using these funds
- Yes, but the funds have all been exhausted

N=9-16
excluding don't
know or not
applicable.

STATUS OF FEDERAL EMERGENCY RELIEF FUNDING: *SUA*s

All 3 *SUA*s that answered this question (100%) had received any federal emergency funding

Other supplemental federal emergency relief funding

American Rescue Plan Act funding

CARES Act

Families First

■ Yes, and we are still currently using these funds

■ Yes, but the funds have all been exhausted

N=2-3
excluding don't
know or not
applicable.

HELPFULNESS OF FUNDING FLEXIBILITIES

83% said one or more funding flexibilities had been helpful.

Expanding the definition of homebound to include older adults who are confined to their homes due to COVID-19



The ability to transfer up to 100% of funding between congregate and home-delivered meal services



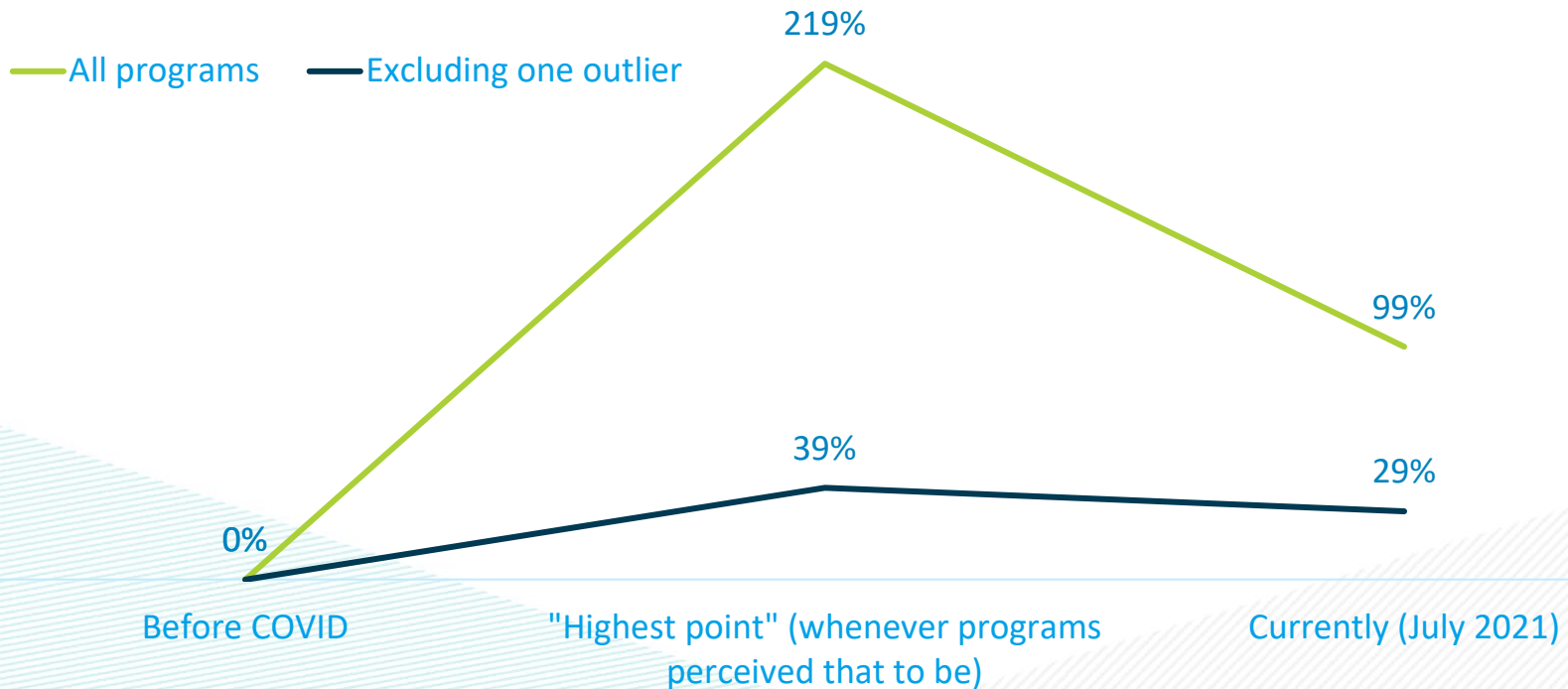
The ability to waive dietary guidelines of meals served



■ Helpful ■ N/A, have not utilized this federal COVID-19 emergency funding flexibility ■ Not helpful

N=-182-190, excluding programs that said don't know.

EXCLUDING ONE OUTLIER WITH EXTREME BUDGET GROWTH, MONTHLY SENIOR NUTRITION BUDGETS HAVE GROWN AN AVERAGE OF 29% SINCE BEFORE COVID



OTHER THINGS PROGRAMS SAY ARE
TRUE FOR THEM



ADDITIONAL THINGS THAT PROGRAMS SAY ARE TRUE FOR THEM (Q9)

- 11 programs shared that they were doing OK/had other sources of funding, e.g., fundraising/grants/donations (n=11)
- 10 programs expressed concern about sustainability/costs
- 2 shared that they were doing OK with federal emergency funding
- 2 shared that they were relying on Meals on Wheels America grants
- 3 provided other comments

Q9. Which of the following are true for you? (Check all that apply.) Other (please specify). N=29 who commented on other things that are true for them. Some programs mentioned more than one comment.

EXAMPLE COMMENTS ABOUT DOING OK/HAVE OTHER SOURCES OF FUNDING (N=11, Q9)

- “Grant money has offset increased expenses due to COVID”
- “Our base of community support, cash and volunteers, allowed us to continue daily meal delivery...”
- “Our community gave us more money to help.”
- “We receive moneys from the three cities we service, plus grants and donations etc.”
- “We received the PPP and a county grant and rely on our wonderful community for additional support through contributions and fundraising efforts.”
- “We were fortunate to receive donations to assist us”

Q9. Which of the following are true for you? (Check all that apply.) Other (please specify). N=29 who commented on other things that are true for them.

EXAMPLE COMMENTS ABOUT CONCERNS ABOUT SUSTAINABILITY AND COSTS (Q9)

- “Because of Covid-19 we were able to help so many more people but have concerns about sustaining without additional resources.”
- “Emergency federal funding helped us serve many new clients but hasn't ended yet; we anticipate having to discontinue service to many of them if additional funding is not secured”
- “Food costs and availability of some food and disposable supplies is an ongoing challenge”
- “We are serving more with less on a weekly frozen basis”
- “We have enough in our reserves to last one more year with no growth and not taking on any new clients who cannot pay. We will soon have to turn people away if they cannot afford to pay for their meals.”

Q9. Which of the following are true for you? (Check all that apply.) Other (please specify). N=29 who commented on other things that are true for them. Some programs mentioned more than one comment.

OTHER COMMENTS FROM PROGRAMS ON WHAT IS TRUE FOR THEM (Q9)

Example Comments: Doing OK with federal emergency funding (n=2)

- CARES federal funding and other fund raising has helped our budget and we have been able to serve all that have needed food.
- We have set aside some emergency funds to manage the increased volume

Example Comments: Relying on Meals on Wheels America grants (n=2)

- “MOW grants have been critical to our operation.”
- “We still have those people on the routes but it seems to be a spinning door. The \$10,000 MOWA grant was soooo appreciated by the MOWS staff. That really meant a lot to them. We also replaced two of our vehicles...”

Other comments

- “N/A - We are the funder”
- “Clients pay for meals out of pocket”
- “Government funded.”

Q9. Which of the following are true for you? (Check all that apply.)
Other (please specify). N=29 who commented on other things that are true for them. Some programs mentioned more than one comment.

ADDITIONAL COMMENTS FROM PROGRAMS

ADDITIONAL COMMENTS FROM PROGRAMS (Q14)

- 22 programs expressed their appreciation to Meals on Wheels America for grants or other services/resources for Members
- 16 described financial challenges or expressed concerns about sustainability or costs
- 11 shared that they had enough funding or were doing OK
- 11 provided other comments about funding flexibilities
- 16 provided other comments

Q14. Please use this space for anything else you'd like to share with us. Thank you for your time to complete this survey and all that you do for the seniors in your community. N=74. Some respondents mentioned more than one comment.

EXAMPLE COMMENTS ABOUT FINANCIAL/SUSTAINABILITY CONCERNS (n=16, Q14)

- In the Chicago market we experienced a 67% increase overnight from the pandemic and as a result of awareness to help as many people as possible, our numbers have remained high and growing. We have expanded our programming as a result. While the world opens and people may lose sight of the dire need covid-19 caused, we want to be sure these new clients are served and resources are found to sustain the sudden and continued increase.
- Our AAA is currently providing funding to serve MOW to what we call Emergency Home Delivered clients - do not have to meet eligibility requirements for MOW. Funding is authorized through 9/2021. Hard decisions will have to be made for those clients after that. Our contract with AAA will not cover those clients.
- Our financial position is currently as strong or stronger than it was at the start of the pandemic but we are very concerned about how to sustain the increase in clients that we are now serving once Families First and CARES Act funding is exhausted.
- the ability to sustain the increased caseload is really the challenge. Next year will likely be covered with public support but that is not guaranteed annually.
- The absolute biggest fear is having to chose who we stop serving when things subside. Who should eat and who shouldn't is not acceptable, anywhere, not just here...
- This has been an opportunity for us to shine as a network. It remains to be seen what sort of contraction might occur when this additional funding and attention subsides.
- We stepped up and served everyone who needed help. Turnover among clients has been incredibly high. Our staff is stretched beyond capacity. The pace has not dropped in the slightest. Seems like in the outside world (at least in the US and in our community) the pandemic has faded substantially, but has not even paused inside our organization. Funding seems to be dropping off (including from MOWA) but our need remains terrifically high.
- To keep our drivers out of our kitchen, we've implemented new positions. The "packers" take the drivers insulated bags and coolers, bring them into the kitchen then fill them and deliver them to the drivers. It would seem that, for safety's sake, we should continue this practice. However, it adds to the price of each meal. There is \$ to pay for this now but what about when all the incremental funding goes away?

EXAMPLE COMMENTS ABOUT HAVING ENOUGH FUNDING (n=11, Q14)

COVID Emergency Funding (Federal, State and/or Local) Helped:

- Covid Relief funding was extremely needed and appreciated during the pandemic...
- COVID-19 funding came at a time when we needed it the most. We remained on the front lines, changing our procedures and policies, adapting to a new normal. Building new partnerships to recruit volunteers and to provide support for our community.
- It was a real challenge to get the meals to the clients during the COVID-19 shutdown. We used staff to cover the entire county. Thanks for the CARES ACT we were able to do so.
- The additional funding has helped our nutrition providers increase the number of older adults who are eligible to receive home delivered meals.
- We benefitted substantially from funding provided by local agencies in our county...
- We have been appreciative of all federal, state and local that helped us during this pandemic

EXAMPLE COMMENTS ABOUT HAVING ENOUGH FUNDING (n=11, Q14)

Donations/Grants Helped:

- During Covid we never stopped delivering and never had waiting lists. The publicity and attention we received has increased our client numbers, but also donations.
- Our organization and the people we serve have benefited greatly by the gracious acts of local citizens & businesses in our community. Their support will be forever cherished...
- We are currently using CV19 Grant money from 2020 to hire a second kitchen in 2021 so that no senior goes without a meal. We plan to keep this second kitchen and use it as a resource to eliminate any future wait list.
- we have done our best to meet the needs of our seniors in our area, we've had many local groups help us with donations and volunteers to keep our program strong
- We have never received government funding (except the PPP loan in the early days of the pandemic) and are completely privately funded. Our community partners and donors have been extremely generous and we are on solid financial ground. In addition, having moved into our new expanded kitchen facility in August, 2020, we have greatly increased our capacity and have recently also expanded our geographic footprint. We have never had a waiting list (and hopefully never will!), having the resources necessary to serve all within our geographic boundaries who qualify.

EXAMPLE COMMENTS RE FUNDING FLEXIBILITIES

Additional Flexibilities Needed:

(n=11, Q14)

- Emergency covid-19 funds have been helpful but they're all restricted to meal costs only. We need operational monies for personnel, transportation and fuel for fleet vehicles.
- Having ACL grant funds for more than one fiscal year at a time was very helpful. Additionally, our State (Illinois)/Illinois Department on Aging (IDoA) is now allowing our AoA's to use the dollars over more than a one year period. (IDoA forced CARES funding to be spent within the same fiscal year it was received.)
- ...Also would like to see additional flexibility for medical meals, offering nutritious snacks with ability for it to be funded through our federal funding.
- ...Dedicated funding to congregate only and HDM only must change as seniors opt not to go to congregate sites...
- We need funding that goes directly to the frontline workers who were out there face to face with the people. They put their own lives on the line to keep our people fed. The drivers appreciated that 10,000 grant from MOWA but divided out among all of them came out to like \$500 for a year. That isn't much when you are out there day in and day out delivering and putting your own safety behind everyone else's. Someone needs to give to the workers, not the programs. We bought supplies like masks, gloves and sanitizer but that should have been money spent on people.
- While the extra funding has been helpful in providing services, having to track this funding separately is ridiculous. The demands that have been placed on an already bare bones agency such as ours have been buckling as far as reporting requirements. The fact that CARES Act funding expires Sept. 30 and there is a DEMAND that we get it spent ASAP is ridiculous. We don't have the capacity (volunteers, manpower) to get this done. Our D.O.T. was able to obtain an extension through June of 2022 so that this funding can be used in a reasonable manner to provide services. Pushing to spend funding by purchasing extra meals to serve existing customers without providing admin costs, capacity building capability, etc. is utter stupidity...

EXAMPLE COMMENTS RE FUNDING FLEXIBILITIES

(n=11, Q14)

Would Be Helpful to Continue Flexibilities Beyond Pandemic:

- I would like to see the flexibilities that were offered during the pandemic to remain. We found that many clients appreciated having the flexibility to receive meals on alternative schedules, a greater number of meals at one drop off, and having options for alternative meals. We found that many clients who were food insecure appreciated receiving 2-3x more meals at one drop off time. When asked if clients would like to remain on a 2-3 day delivery schedule rather than 6 days a week 93% would like to stay on this schedule for flexibility for doctor's appointments and even to get out of the home more frequently. However, our AAA wants us back to 6 days a week...
- We have been allowed to do curbside pick up for congregate meals and our state network of providers is wanting that to continue. We may have people fall through the cracks if congregate meals goes back to fully in person not allowing a grab and go option.
- We would like to be able to continue to serve Congregate meals as a drive-through option.
- Providing meals to go in the Congregate setting has allowed us to reach individuals that we were unable to pre-Covid. Unclear if Congregate dining room setting numbers will return to normal...

EXAMPLE COMMENTS RE FUNDING FLEXIBILITIES (n=11, Q14)

Flexibility Was Helpful:

- The emergency funds were extremely helpful. The flexibility of usage was very helpful.

Flexibility Has Been Unhelpful Due to Insufficient Resources:

- The reason I picked not helpful for expanding the definition of who qualifies for homebound is because it has made getting people served more difficult. If everyone qualifies for home delivery, that's what everyone wants. We have limited resources to meet those needs... our kitchen can only make so many meals and we only have so many drivers.

EXAMPLE OTHER COMMENTS (n=16, Q14)

Staffing/Volunteer Challenges:

- The biggest obstacle our organization faced was a volunteer shortage.
- The difficulty hiring drivers is a major problem right now. People who have been working straight out since March 2020 are burned out and need a break. The emotional and physical stress is as much or more of a problem than the financial stress.
- We have not had to much of a strain financially but we have had more of a strain with staff availability during COVID.

Small Program/Would Like to Be Able to Do More:

- Because the government was so gracious to give food out to seniors at no charge, many of the people who call us today, after the government programs stop, want free meals. We would love to provide them with free meals; however, we only have a certain amount of monies designated for those kinds of individuals. We also are a part-time staff of 4 now and rely on volunteers for extra help.
- Our program is small with part-time office staff and volunteers assisting with operations, meal delivery, correspondence, grant writing and responding to surveys.

EXAMPLE OTHER COMMENTS (n=16, Q14)

Don't Know What Funding Their Program Receives:

- emergency federal funding::: the Main city office is the one that handles these moneys, I as Director deal with only day to day operation of the center.
- We have and still are receiving federal relief funds. I put N/A because I don't know which relief funds we have received since it flows through our AAA - they have not specified to me

Other Comments:

- COVID has been hard on all of us. More people are asking for services and are afraid to come out of their home. Funding is critical to assist our vulnerable community members.
- Covid Relief funding was extremely needed and appreciated during the pandemic. As our senior centers open, we find many still reluctant to go to public places. The number of returning clients has slowly increased the past few weeks, but now, with the threat of the delta variant, clients are fearful again.
- The revenue, question asked for budgeted numbers, which don't necessarily show the impact of COVID as the actual numbers would.
- This has been a very challenging 1 1/2 years and there is no end in sight. We have always pushed to highlight and celebrate MOWA services but the old saying of be careful what you wish for truly applies. Everyone seems to finally appreciate our work; however we didn't want it to be like this.
- We added a grocery program that helped deal with the many requests for home-delivered meals service.
- We allowed Provider agencies to do Grab-n-Go meals and weekly food boxes for Seniors and grandchildren if in their home.
- We are not federally funded. We fund our services through grants and donations from local corporations and individual community members.
- We deliver homebound seniors 50+ with daily meals, in the communities we serve.

ABOUT THE SURVEY

DATA COLLECTION AND RESPONDENTS

Data collection

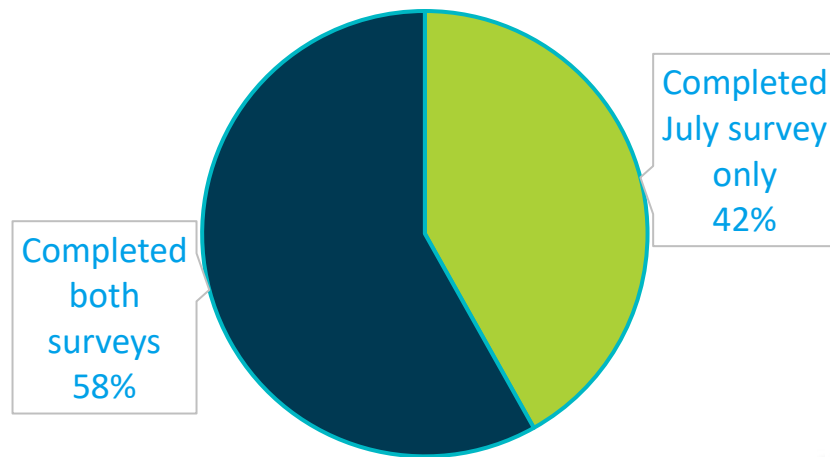
- Survey fielded online (in SurveyMonkey) in July 2021
- 14-question survey

Respondents

- Survey requests emailed to all 1,062 unique active Members
- 269 surveys received – 11 duplicates removed = 258 unique respondents
- 24% response rate (258 / 1,062)
- Not all respondents answered all questions

42% OF RESPONDENTS HAD ALSO COMPLETED NOVEMBER SURVEY

N=258 Members who completed the July 2021 survey.

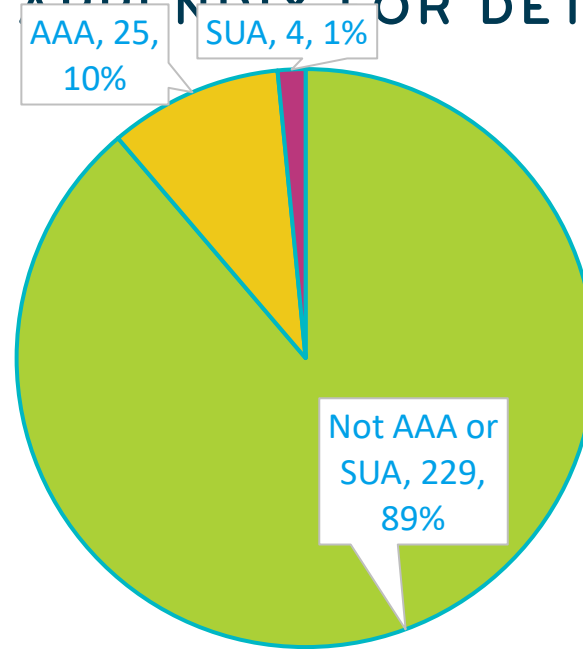


RESPONDENTS FROM 47 STATES

- All states (+DC) except AL (7 Members), DC (1 Member), DE (6 Members) and ME (7 Members)
- No responses from 5 Members outside the states (2 in Alberta, 2 in Ontario and 1 in Puerto Rico)

N=258.

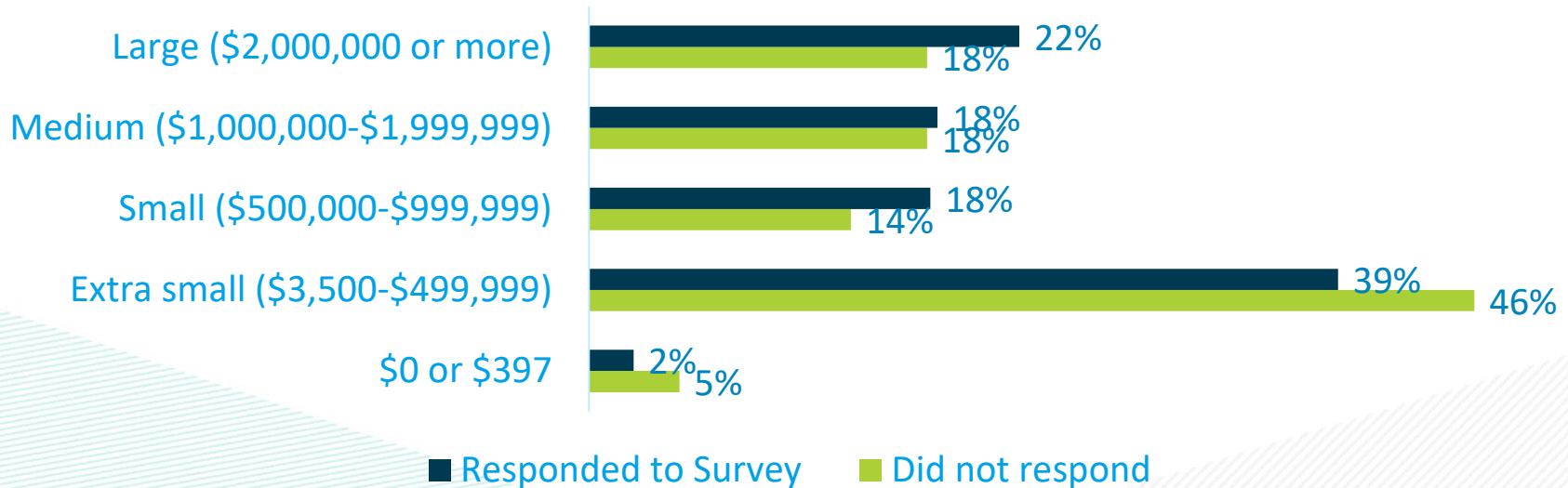
RESPONDENTS BY ORGANIZATION TYPE (SEE APPENDIX FOR DETAILS)



N=258.

RESPONDERS WERE SIMILAR IN SIZE TO NON-RESPONDERS IN BUDGET SIZE

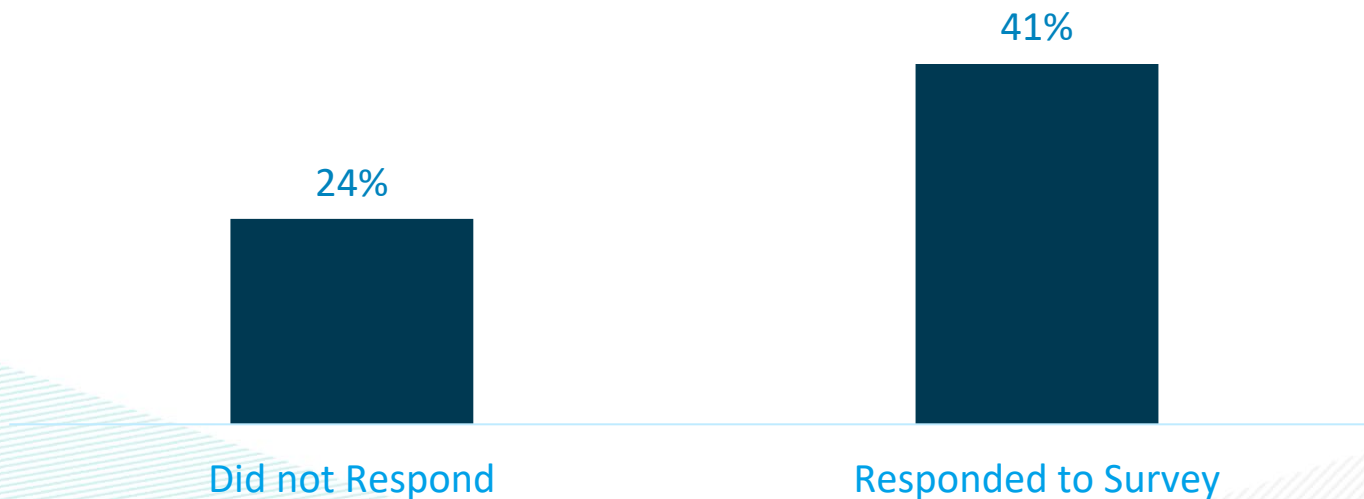
Budget Size, by Responded to Survey or Not



N=804 did not respond, 258 responded, 1,062 total Members who were sent the July 2021 survey. NetForum budget data.

MORE RESPONDERS HAD “MEALS ON WHEELS” IN NAME

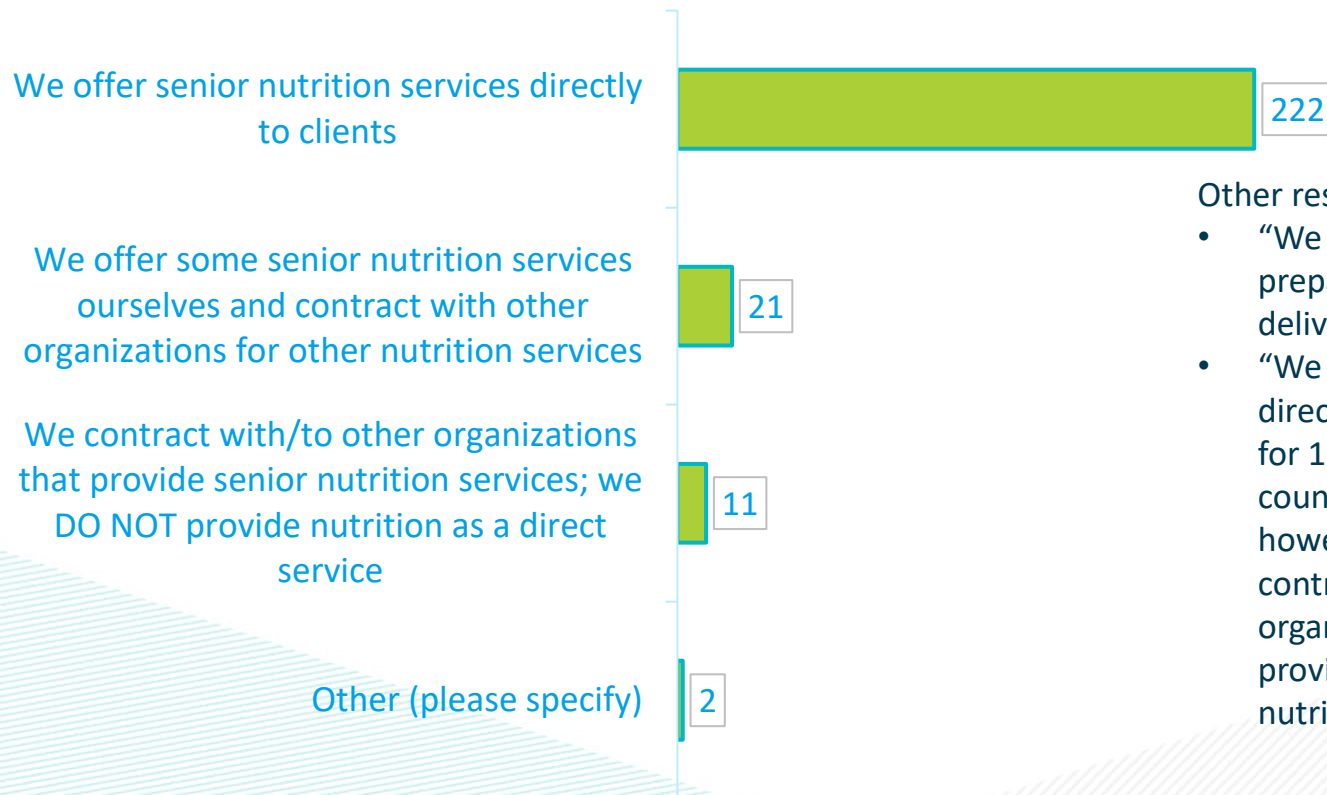
"Meals on Wheels" in Name



A possible explanation is that survey responders may be more engaged than Members who did not complete the survey.

N=804 did not respond, 258 responded, 1,062 total.

95% OF RESPONDENTS OFFER AT LEAST SOME SENIOR NUTRITION SERVICES DIRECTLY



N=256

Other responses:

- “We contract the food preparation but we deliver the food”
- “We currently are the direct service waiver for 1 county of the 8-county region, however, we typically contract with/to other organizations that provide senior nutrition services”



TOGETHER, WE CAN DELIVER.®