



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

NAME OF AGENCY			
Meals on Wheels Northeastern Illinois			
CONTACT PERSON AND TITLE			
Deborah Morganfield			
ADDRESS			
1723 Simpson St.			
CITY		IL	60201
Evanston			
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WEB			
www.mealsonwheelsnei.org			
NO. OF YEARS IN EXISTENCE		TOTAL AGENCY FUNDING REQUEST FOR PROPOSED YEAR	
53		\$ 25,000	
PROGRAMS REQUESTING FUNDING	AMOUNT RECEIVED LAST YEAR	\$ AMOUNT FOR PROPOSED YEAR	FUNDED BY TOWNSHIP SINCE? (Estimate of Year OK)
1. Home delivered meals	\$25,000	\$25,000	2003
2. _____	\$ _____	\$ _____	_____
3. _____	\$ _____	\$ _____	_____
4. _____	\$ _____	\$ _____	_____



AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

Eligibility Criteria For Funding

New Trier Township General Statement of Policy:

- **Each agency/program requesting funding from the Township will be referred to either the Agency Oversight Committee, the Mental Health Committee, or the Money Follows the Person Committee of the Township. Those committees will make funding and agency/program recommendations to the New Trier Township Board of Trustees. You will be notified of their final decisions sometime in the spring.**
- Agencies considered for funding should have been in existence for one year after receiving their not-for profit status from the State of Illinois and have been providing services to the community during that time.
- No agency with the ability to tax or conduct referendums will receive Township funding.

In order to be eligible for funding an agency must meet the following minimum requirements:

- **Area Served** - While an agency may serve areas other than New Trier Township, its programs must serve residents of New Trier Township.
- **Proportion of Township Residents Served**- For agencies serving more than New Trier Township, the amount of funding requested shall take into consideration the proportion of the agency's service rendered to residents of New Trier Township.
- **Non-Profit** - Funded agencies must be 501 (c) (3) not-for-profits.
- **Needs**- The need for the service must be demonstrated.
- **Standards** - An agency requesting funding must have at least one full-time paid staff person, or its equivalent; the credentials of the applicant's staff shall meet professional standards, commensurate with the responsibilities involved.
- **Employment Practices** - The agency must be an equal opportunity employer.
- **Articles of Incorporation** - Submit a copy, as amended, if changed in the last 12 months.
- **Bylaws** - Submit a copy, as amended, if changed in the last 12 months.
- **Use of Funds** - Funds must be used as specified in the grant application and as approved by the Township. Changes must be cleared with the Township.
- **Accessibility** - *All services must be available to clients with disabilities and the agency must be able to deliver services from a site that is ADA accessible. If not, please explain.*



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

- **Accountability** - The agency shall maintain communication with the assigned advisory committee liaison, who must be allowed to attend board meetings upon request. The agency may dismiss the person from a board meeting if they convene into Executive Session. The agency shall provide meeting minutes to the liaison upon request

- **Financial** - *All agencies with budgets of greater than \$300,000 must have an annual audit performed by an independent CPA. Those agencies with a budget of \$300,000 or less must submit to the Township a copy of form AG990 that is sent to the Attorney General's Office. The Township reserves the right to request an audit be performed for agencies with budgets of \$300,000 or less.*

- **Absence of Conflicts of Interest** – The agency certifies, to the best of its knowledge, information, and belief, that it has no current relationship or involvement with any New Trier Township Trustee, Employee, or Committee Member which the Agency reasonably believes could either favorably or unfavorably influence the Township's possible grant of the Agency's funding request.
YES X
NO _____ - **If no, please explain.**

Other Certification Issues

Please mark yes, no, or other as appropriate next to each statement. If no, or other, please explain. Supporting documents may be requested at a future date and must be supplied upon request.

- | YES | NO | OTHER | (PLEASE EXPLAIN) |
|-----|--------------------------|--------------------------|---|
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency maintains a personnel policy manual |
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a non-discrimination policy |
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a sexual harassment policy |
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a grievance procedure |
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a Strategic Plan
Covers years _____ |



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

- X Agency produces an Annual Report
Most recent report covers period 2020-2021_____

- X Agency has an effective fiscal management system in place and has disclosed any and all Conflicts of Interest as described in the Eligibility Criteria for Funding.

- X Audit or AG990 completed and copy provided to the Township for most recent fiscal year

- X Agency maintains general liability insurance coverage and names New Trier Township as additional insurer
Amount of coverage 3,000,000
Name of insurer AmTrust North America
Effective dates of coverage 4/22/2021-4/22/2222

- X Agency pays all state and federal payroll taxes

- X Agency has a conflict of interest policy.

- | YES | NO | OTHER | (PLEASE EXPLAIN) |
|--------------------------|--------------------------|--------------------------|---|
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency has by-laws in place
Date last amended/accepted _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | X | Agency is accredited by recognized accreditation organization (where appropriate)
Date of most recent accreditation _____
Accreditation Organization _____ |
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency's board serves without compensation
Number of board members <u>12</u>
Number of Board vacancies <u>2</u>
List board sub-committees <u>Executive, Governance, Volunteer, Finance, Philanthropy</u>
Schedule of board meetings <u>3rd Wednesdays of odd numbered months</u> |
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency has Auxiliary or other Advisory/Governing Board. If so, please explain:
<u>Advisory is maintained on an ad hoc basis for input and support</u> |
| X | <input type="checkbox"/> | <input type="checkbox"/> | Agency provides staff with opportunities for training and personal development |



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

- X Agency has filed its annual report with the Illinois Attorney General
01008039
- X Agency has filed its annual report with the Illinois Secretary of State
50533663
Federal Tax ID # 36-2662113

We certify that we meet all the eligibility criteria for funding and that the information contained in this application is true and correct to the best of our knowledge and agree to comply with all requirements of the program and funder if we are awarded and accept funding. Furthermore, our Board has been advised of the Eligibility Criteria and approved our signing of this document.

Agency Director Name Deborah Morganfield

Signature

Date:

Board President Name Lenore Erickson

Signature

Date:

Organizational Profile

(A) The Organizational Profile is part of the New Trier Township Application For Funding; and (B) It is the Agency's responsibility to keep the Organizational Profile information current each year and provide New Trier Township with further information on an ongoing basis if there are any significant changes, such as to the mission, organization, board requirements, and/or other changes.

(1) Briefly summarize the agency's mission, history, services, and organizational structure. Have these changed significantly over the lifespan of the organization? (Please attach a current organizational chart, if available.)



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

Agency's Mission:

The Mission of Meals on Wheels Northeastern Illinois (MWNEI) is to foster health and contribute to individual well-being and independence by delivering nutritious meals and medically prescribed diets and by providing other support services to the homebound, elderly, disabled, and persons unable to care for their nutritional needs.

Purpose:

The purpose of the program is to provide nutrition support for persons who need home delivered meals so they may continue to live in their homes for as long as possible and avoid their premature placement in costly and restrictive institutions. Aging in place allows them a measure of independence and privacy; and their presence benefits their communities.

History

In 1968, CEDA (Community and Economic Development Association) of Cook County and concerned citizens saw that numbers of Evanston seniors, particularly those with limited incomes were at risk of malnutrition. The group approached the Chief Executive Officer of Saint Francis Hospital, who arranged for the hospital kitchen to prepare meals for home delivery.

Volunteers were recruited and trained, delivery routes were laid out, and schedules drawn up. Meals on Wheels Northeastern Illinois's first deliveries were made in October 1968 to residents of Evanston and nearby Chicago.

MWNEI's service area expanded so that by 2017, New Trier Township communities, Skokie, Deerfield, Glenview, Golf, Morton Grove, Northbrook and Lake County to the Wisconsin border were added

In 2002, to avert isolation, a Friendly Visit program was introduced, and a Grocery Shopping program was added the following year. In 2013, MWNEI set up an office in Evanston.

From the beginning, area churches and service organizations helped MWNEI recruit volunteers.

In 2018, in response to the limitations of its usual food providers, a consultant with expertise in food production was hired to study the feasibility of obtaining meals from alternative sources. The conclusion was that MWNEI needed its own food production facility that could provide tasty, nutritious meals reliably and cost effectively.

2019 saw the formation of a Kitchen Task Force and the raising of more than \$500,000 required for implementation.

The same year saw the name change to Meals on Wheels Northeastern Illinois – a name that aligns the organization with a respected national identity and more immediately identifies its role in the community.

In May of 2020, kitchen staffing and construction was completed and the kitchen opened in June.

With the advent of the COVID-19 crisis MWNEI faced what could have been



AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

insurmountable obstacles. However, it made innumerable adjustments to the pandemic and has continued to fulfill its mission. In point of fact, as a result of the crisis, it has become a supplier of meals to other organizations, i.e., providing meals for the area American Red Cross for victims of disasters – tornados and house fires, and more.

Community and population served

Demographics of current recipients of MWNEI services:

Caucasian-59%, African American-14% (though they number about 13 percent of seniors in Cook County) Asian-2% Hispanic-4%. Ages: The elderly account for 79% of clients. Those under the age of 60 have physical or mental disabilities. MWNEI even provides meals for occupants of the Evanston YMCA single room occupancy residence for men who have inadequate cooking facilities.

MWNEI serves clients at all income levels. 51% live on less than \$15,500; 28% have incomes between \$15,500 and \$25,800, and 21% have higher incomes. The roughly 18% of MWNEI clients have a mental health diagnosis and are on Medicaid.

MWNEI has unique access to the homebound who as a group are likely to be elderly women, African American, on Medicaid, have chronic medical conditions, and have symptoms of depression or dementia. They are often hard to reach and underserved.

Services (details in section below)

- Nutrition support to older adults and persons with disabilities, helping them live independently for as long as possible
- Therapeutic meals for persons with chronic conditions
- Subsidies for clients who need help paying for their food
- *Connections of clients with support services to promote safety, independence, and quality of life
- *Food production for agencies serving clients needing meals
- *Nutrition education for clients and the community
- Help in controlling healthcare costs

Organizational structure

Meals on Wheels Northeastern Illinois operates with a staff which includes the full-time executive director, food service director, kitchen staff (line cooks and dishwasher), program coordinator and client coordinator. The bookkeeping responsibilities are being handled by a contract accountancy firm. All report to the executive director who reports to the Board of Directors.

The organization is grateful to its vital more than 800 volunteers who receive no compensation - not for auto usage, not for gas -- for their service.



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

Board members add invaluable counsel and expertise.

Significant changes over the lifespan of the organization

Meals on Wheels Northeastern Illinois has grown to serve more persons in a larger geographical reach. It offers a greater scope of services and expanded outreach into the community. This has been accompanied by the increased capacity to do so.

*The scope of activities/services of MWNEI has grown. While our signature program is home delivered meals, MWNEI provides more. It links clients to support services to promote their wellbeing. During deliveries, and while using an app on their phone or a MWNEI iPad uploaded with ServTracker software, MWNEI volunteers note signs of changes in clients' status and record their observations. If clients need help, the software sends a message to staff who follow up with clients and their families, locate available services, and arrange referrals to **a wide range of additional services such as** handyman services to eliminate safety hazards, transportation, personal assistance with bathing, help paying for utilities, assistance with their taxes, legal aid, smoke or CO₂ detectors, help with mental health issues including alcoholism, obtaining COVID-19 vaccination, arranging a phone call to combat loneliness, making arrangements for shopping/food pantry visits, and more.

*The self run food production facility is the most dramatic change in the history of the organization. The quality of the meals produced by the kitchen is unlike the meals served by most Meals on Wheels organizations. Clients who have expressed their reluctance to receive what may be considered "institutional" food are surprised when they receive their first meals. And then they give it accolades. Additionally, the new food production facility allows us to produce much larger quantities and in turn serve far more people.

*MWNEI has expanded its community outreach by providing meals on short notice to community agencies e.g. the American Red Cross aiding victims of fires or tornados, the YWCA women's shelter when their electricity was lost during a recent storm, and the DesPlaines Meals on Wheels program. The MWNEI kitchen is becoming increasingly important to the wider community.

*Increased organizational efficiencies resulting from improved delivery logistics and high-quality food to appeal to more full pay clients will result in cost benefits. Its ServTracker software platform, a single integrated solution has enabled MWNEI to manage many aspects of its operations, including service delivery, billing, and reporting in a secure and efficient manner.

(2) Briefly summarize the role of the board and the requirements for serving on it. What role does the board play in the administration and operation of your organization and what is the desired size of a full and active board?



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

The 12-member board of Meals on Wheels Northeastern Illinois reviews and approves the budget and financial reports, provides input into and approves the strategic plan, and participates in fundraising activities. Board members serve on committees and make financial contributions to the organization. Some also deliver meals. Board meetings are held on the third Wednesdays of odd-numbered months. (The ideal board size is between 12 and 15 members. Several potential board members are being considered to fill the roster.)

Requirements for Serving on the Board: Members are sought who would promote the agency's mission and who would add diverse points of view to decision-making and governance of the organization. Accordingly, the Board Development Committee has recruited more board members who have been in business and who contribute expertise to MWNEI.

Agency/Program Funding Request Information

PROGRAM DESCRIPTION

- (1) Describe the services provided by this program, eligibility requirements, and the target population.

Services

Nutrition Support

MWNEI provides home delivered meals to persons at risk of malnutrition and cannot prepare meals for themselves. Between 11 am and 1pm, six days a week, volunteers deliver meals to clients living in Northeastern Cook and Lake Counties. Each set of meals (lunch and dinner) provides at least two thirds of an adult's daily recommended dietary allowance

Delivery of medically tailored meals

Individuals who are prescribed special diets -- for diabetes, kidney failure, swallowing disorders or other chronic conditions -- get therapeutic diets. They get meals which are tailored to their individual' medical conditions -- diabetic, gluten free, vegetarian, renal (very low sodium), and modified texture (chopped or pureed) meals, and which are prepared under dietitians' supervision.

Unique quality meals

Our new kitchen opened in 2020 and offers meals those served by most Meals on Wheels organizations. Clients who have expressed skepticism about signing up are surprised at menu choices and appealing offerings such as chicken marsala with mushrooms in a wine reduction, savory meatloaf with mashed potatoes, and balsamic glazed salmon steak.

Nutrition education



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

Each delivered meal contains a food label and contributes to nutrition education. The label contains a list of ingredients and a chart of calories, protein, fats, sodium, etc. contained in each main dish. Also, it lists potential food allergens e.g., egg, lactose, gluten or other. This knowledge is important to help individuals understand good nutrition and get in the habit of making healthy food choices. An expiration date is also included, and food safety messages are sent to clients periodically.

Also, to inform the community of up-to-date nutrition and food facts, a speakers' series is planned, similar to the one held by MWNEI prior to the pandemic at the Evanston Library. The series of three talks addressed food insecurity in the community. Upcoming series may focus on special nutritional needs of the elderly, or myths about food, or about how to measure or detect malnutrition. This is on hold until we feel safe enough to gather.

Links to Support Services

MWNEI has unique access to the hard to reach homebound. Over time, volunteers develop relationships with clients, making them likely to pick up on the clients' subtle changes. When they deliver meals, volunteers chat and observe both major and lesser changes in their clients' health, appearance, or mental status. And they may do so each time they deliver meals. This regularity is a far cry from the intermittent evaluation that their doctors perform. And this frequency is vital, as with the elderly conditions change rapidly.

Volunteers use an app* on their own phones or iPads which have been preloaded with routing instructions and the ability to note clients' health, self-care ability, mobility, home environment, loneliness. This data is provided to the MWNEI office with the click of a button. Then a sequence of events is triggered that includes further assessment and linking the client with resources. * The program allows them to log into the route and then (for security purposes) removes their access when the route is complete.

Support services that clients may receive include: housekeeping, personal assistance with bathing, help paying for utilities, assistance with their taxes, legal aid, smoke or CO₂ detectors, help with mental health issues including alcoholism, and help obtaining the COVID-19 vaccine.

Community Outreach

MWNEI is a designated meals provider for disaster victims. MWNEI worked with American Red Cross to provide meals for victims of recent tornados and house fires. MWNEI meals also went to the local YWCA whose kitchen experienced an equipment failure. Hilda's Place has served our meals and the DesPlaines Meals on Wheels program will begin serving our meals in November 2021.

Control of Health Care Costs

- a. Low-income clients are subsidized; individuals' costs are controlled
- b. Good nutrition is a preventive measure



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

When clients are well nourished, their transfers to costly and restrictive care facilities can be delayed.

c. Screening and connection to needed services prevents exacerbation of problems.

d. Post hospital nutrition aids recovery. Individuals who receive medically tailored meals have about 1.5 fewer emergency room visits than others and 20% experience fewer rehospitalizations. MWNEI provides meals to AMITA Health Saint Francis Hospital Evanston patients in the service area for a month after discharge. Individuals who receive medically tailored meals have about 1.5 fewer emergency room visits than others and 20% experience fewer rehospitalizations.

Eligibility

All individuals who are over 18 and reside in the MWNEI service area are eligible to enroll. They conveniently can complete an application online or over the phone. The MWNEI delivery area includes Northern Cook County and Lake County.

Service may begin within 48 hours of the phone call. Applicants do not need to travel or undergo in-home assessments. Most clients elect to get meals between three and five days a week, and they may use the service as long as they like.

Eligibility for subsidies is determined by clients' income. Individuals who request subsidies for paying for meals are asked to provide documentation about their incomes. They are given a reduced rate based on 12 percent of their daily income. Subsidized clients receive the same services as all others.

2. Program fit with priorities identified by New Trier Township in its strategic plan.

Meals on Wheels Northeastern Illinois (MWNEI) addresses the need of the homebound for a "decent quality of life that includes basic necessities, adequate food, and medical care." (Needs listed in Township Consolidated Plan pages 58 and 139). MWNEI's home delivered food helps avert malnutrition which, in turn, fosters individuals' health and quality of life.

"Many more people are deciding to stay in their homes with needed help-services from the community," (New Trier Township Strategic Plan 2007-2012 p 5). Meals on Wheels Northeastern Illinois provides those help-services. Another priority identified in the Township plan is to serve persons with disabilities. About 20% of Meals on Wheels Northeastern Illinois' clients are under the age of 60 and have disabilities such as serious mental illness, multiple sclerosis, or cerebral palsy.

Also, in the plan is the statement, "Even in an affluent Township like New Trier, the number of working poor has grown." As noted above, Meals on Wheels Northeastern Illinois is cognizant of the need of individuals living on low incomes for help paying for their meals. In point of fact, MWNEI subsidizes more than sixty percent of its clients.



AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

Please check each priority you feel the program addresses. (Most programs will address only one or two priorities.)

See our website at www.newtriertownship.com for more information.

Aging in Place

Low Income Families

Youth Services

Persons with Disabilities

Other _____

NEED

- (2) Describe the need and demand for this program in the community and justify that it deserves investment of Township funding. You may include both data and examples of individual clients.

Rising number in need of services: In the US, a large *and increasing* number of people with multiple chronic conditions, cognitive impairment, and functional decline live in the community. The number of homebound adults more than doubled during pandemic. The share of the population that rarely or never leaves their homes rose to 13% last year from 5 percent in the previous decade. For every one person in a nursing home, there are about five people in their homes with equal levels of disability who rely on a combination of family and community-based services.

Community-based services are needed. As they age, the majority of individuals wish to live in their own homes and communities and to avoid costly and restrictive institutionalization. But living at home is not easy. To remain at home safely and successfully manage their lives, many need long-term services. In fact, nearly half of homebound adults who have difficulty performing daily activities *do not get the help they need* such as help getting dressed, with bathing, installing hand rails, reduced cost heating or A/C. Without help, many do not get out of bed.

The pandemic exacerbated their needs and numbers. Add an untold number of older persons who now are even more isolated and due to inactivity are debilitated. Homebound patients and their families need to be assured of access to needed care to remain safely in the community. It may include linking them with meal delivery, telehealth, portable medical equipment, social contacts and more.

The support an overlooked population. The homebound often are ignored and underserved. During the COVID-19 vaccination campaign, the country learned to become aware of the needs of the homebound and how hard it is to reach them.

To address the rise in chronic diseases. A climbing number of diabetics need assistance: One third of the U.S. population over 65 years old has diabetes. Both Hispanics and African Americans have exceedingly high rates of diabetes. Adhering to a diabetic diet is very challenging. The consequence of uncontrolled diabetes can be devastating: kidney disease,



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

amputations, and blindness. They need help complying with their special diets or getting prepared meals. MWNEI offers therapeutic diets.

Need for education about nutrition during aging. Maintaining a nutrient-dense diet is critically important for older adults yet, this can be difficult to achieve. Aging is often accompanied by loss of appetite, malabsorption, increased protein requirements, and more.

Caregiver support. Care givers need to avoid burn out and information on needs of the aged. They need information on dietary needs, supplements, food/medication interactions, and more.

Community agencies often need sources of meals for their clients e.g., the area American Red Cross during disasters, YWCA shelter kitchens experiencing electrical outages, and more.

Pet care: It is well established that owning a pet can be physically and mentally beneficial for people of all ages. They are so important that people who are food insecure still will give their food to their pets.

To reduce unnecessary health care costs. a. Living at home is less costly than in an institution. b) Malnutrition exacerbates diseases and prevents healing. Seniors without regular nutritious meals can wind up in hospitals, which drives up Medicare and Medicaid costs. c. good nutrition after hospitalization improves recovery and avoids the cost of rehospitalization d. Monitoring wellbeing results in early interventions to prevent exacerbations of health conditions which are costly to treat.

The MWNEI program deserves Township funding as the organization supports the well being of Township residents and the wisdom, skills, generational nurturing, and other contributions these individuals make to the community and society.

- (3) Are you able to meet the full demand for this service or is there a waiting list? What new or unmet needs do you see in the community or for the clients served in this program?

At this time, MWNEI is able to meet the full public demand for its service.



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

CAPACITY

- (4) Demonstrate that the program has the vision, personnel, and skills to successfully carry out the program and achieve its goals, objectives and performance measures. Summarize any major changes in staff or personnel.

Vision

The elderly and persons with disabilities will receive sufficient support services to permit them to live independently in the community for as long as possible and able to contribute their wisdom and experience to their families and society.

MWNEI's demonstrating success in fostering its vision and realizing its mission

The success the MWNEI in achieving its mission has been amply demonstrated during the past. Its discipline, motivation, and its agility in responding to continuously changing circumstances allowed it to meet the onerous challenges unleashed by the COVID-19 crisis. MWNEI even expanded during the pandemic!

In order to continue to carry out its mission. it had to re-evaluate every move to find ways to stop the spread of COVID-19 and prevent it in clients. We also have responded to a flood of requests and pleas from individuals and community agencies for meals.

We have been able to quickly assimilate the influx of new clients many of whom are low income and need MWNEI subsidies in order to pay for their meals. We have had to draw and redraw delivery routes in order to accommodate them.

Because of COVID-19, we were forced to depart from our decades-long practices and scheduled weekly (instead of daily) deliveries of frozen (instead of fresh) meals. To protect our clients, instead of face to face encounters with volunteers, contactless deliveries have been taking place. Volunteers who are older and at risk were furloughed and new volunteers stepped up but needed to be vetted and trained. Staff worked from home.

More remarkable is that in the face of these restrictions and in the very midst of the pandemic, MWNEI built, staffed, and delivered meals from its new self-managed Community Kitchen. The kitchen is serving individuals and other community agencies whose sources of meals for their clients have shut down. And it is delivering nutritious meals to newly discharged hospital patients from AMITA Health Saint Francis Hospital Evanston to promote recovery and reduces costly and distressing hospital readmissions. During this time, as well, MWNEI also has become a designated meals provider for disaster victims for the regional American Red Cross.

Due to increased efforts, MWNEI fundraising has become increasingly successful. With increased individual donations. Raising the \$500,000 cost for the kitchen buildout was completed. Funds for additional kitchen inventory and equipment continues to be vigorously pursued.



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

Without a pause during the past 53 years, Meals on Wheels Northeastern Illinois has been providing services to the homebound elderly and persons with disabilities in northeastern Illinois. And despite the formidable challenges due to the COVID-9 crisis, it continues to do so. No, it has become stronger in response to the demands.

SERVICE STATISTICS/DEMOGRAPHICS

(5) Who is being served by this program? Please provide a statistical breakdown of the number of clients served, the total units of service delivered, and costs per unit of service by filling in the chart below. Please state and define your unit of service for this program and why you chose it. To calculate cost per unit of service, divide the total number of units of service into the total budget for the program. (Suggestions for the appropriate unit of service are included in the proposal in the directions. For some programs you may wish to calculate cost per unit of service in more than one manner.)

(6a) Unit of service definition – one delivered meal

(6b) SERVICE STATISTICS – Please indicate fiscal year dates for each column

PLEASE INDICATE FISCAL YEAR/DATES IN EACH COLUMN	Prior Year FY 2021	Present Year FY 2022 partial	Proposed Year FY 2022
Number of persons served (unduplicated count)	422	166	500
Number of units of service	53,089	8,801	100,000
Cost per unit of service	\$26.19	\$27.11	\$20

(6) What are the demographics of New Trier clients served in the prior year? (breakdown by community).

Wilmette: 16 clients
 Monthly Income: \$700-780 (3) \$1,000 (2) \$1,900-2,000 (2) \$3,900 (1) 8 unknown
 Race: 12 White, 4 unknown
 Ages: 102 (1), 90s (3), 80s (4), 70s (5), 60s (2), 50s (1)

Winnetka: 3 clients
 Monthly Income: 3 unknown
 Race: 3 White
 Ages: 76, 83, 94



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

Kenilworth: 2 clients
Monthly Income: \$5,000, unknown
Race: 1 White, 1 unknown
Ages: 82, 77

Glencoe: 1 client
Monthly Income: unknown
Race: unknown
Ages: unknown

(7) Total from New Trier Township (unduplicated).
22

(8) New Trier Township clients are what % of total?
5

(9) Units of Service to New Trier clients.
3,305

(10) Units of Service to NTT clients are what % of total
6

(11) New Trier clients age breakdown
2 under age 65
19 over 65
1 Unknown



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

OUTCOMES/EVALUATION

- (12) What outcomes did you achieve for your clients in the prior year? Results should be client-outcome based, specify a target level of achievement, the measurement tool that was used, the rationale for setting the target at a certain level, and a timeframe for accomplishment. Detail any changes made in the program as a result of these outcome results.

Goal 1: To provide nutritional support for the elderly and persons with disabilities who wish to age in place for as long as possible.

Outcome: Prior year outcomes/results achieved the target level: 97% of clients receiving regular MWNEI deliveries continued to live in the community.

MEASUREMENT tool: A review of the agency's "stop" report, shows the number of clients who have not moved to nursing homes or other institutions.

RATIONALE for setting the target: MWNEI history and a national benchmark guided the setting of the target. Regularly, more than 95% of MWNEI clients continue to live in the community.

Nationally, 92% of recipients of home delivered meals report that home delivered meals enabled them to continue to live at home. (www.agidnet.org/CustomTables/NPS/Data/)

TIMEFRAME for accomplishments: MWNEI Fiscal year 2021

CHANGES made in the program as a result of outcomes: a. MWNEI's new kitchen is improving meal quality, taste, and appearance. MWNEI connections of clients with support services will gain momentum now that Covid-19 restrictions are being relaxed. b. Continued refinements of MWNEI operations contribute to the success.

Goal 2: To provide therapeutic meals that will help clients maintain or improve their health.

OUTCOME: Last year: 90% of MWNEI's clients receiving therapeutic meals reported that the meals helped them comply with their diets/and or improve their health.

MEASUREMENT tool: Client reporting

RATIONALE for setting the target: MWNEI historic outcomes are the basis for this number.

TIMEFRAME for accomplishments: MWNEI fiscal year 2021

CHANGES made in the program as a result of outcomes: All meals produced by the MWNEI kitchen are cardiac-friendly, diabetic-friendly, and low sodium. For this reason, many of those diets are no longer tracked. In the future we will ask all clients if they feel the meals have helped maintain or improve health.

Goal 3: "To prevent harmful effects of social isolation" see #5 which is combined with #3

Goal 4: To provide affordable meals.

OUTCOME: In FY 2021, MWNEI provided subsidies to roughly 80% of clients – far more than the target 60% of its clients to help them pay for their meals. Target reached.

MEASUREMENT tool: Client subsidy analyses to determine the numbers, percentages, and trends in MWNEI subsidization.

RATIONALE for setting the target: The target has been based on the actual numbers and on trends.



AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

TIMEFRAME for accomplishments: MWNEI FY 2021

CHANGES made in the program as a result of the outcomes. The percent of clients requiring subsidies rose to 80%.

Goal 5 To link clients with services that meet their needs for support services.

OUTCOME: Last year, the targeted 95% of clients with an identified need were offered referrals to community resources

MEASUREMENT tool: ServTracker data on referrals and on anecdotal reports from staff

RATIONALE for setting the target: Client responses as reported in ServTracker.

TIMEFRAME: MWNEI FY 2021

CHANGES in program: Covid-19 prevented full implementation of the program but it is beginning to gain ground.

Goal 6: MWNEI services will promote healthcare cost savings

OUTCOME: Newly discharged patients from AMITA Saint Francis Hospital who are receiving MWNEI services will show 10% fewer (costly) rehospitalizations. The numbers of patients so far have been too low to generate valid results

MEASUREMENT tool: AMITA Saint Francis Hospital will track the number of readmissions

RATIONALE: Evidence is that 18 percent of Medicare hospitalizations result in readmissions within 30 days of discharge and that nutrition support leads to cost savings from fewer emergency room visits, reduced re-hospitalizations, and premature transfer to costly care facilities.

(https://www.aging.senate.gov/imo/media/doc/SCA_Berkowitz_7_12_17.pdf)

TIMEFRAME: MWNEI FY 21

CHANGE: No change

- (13) What results are you committed to achieving in the present year? (If outcomes are the same as above, simply state that we hope to improve upon the past year's results)

We hope to improve upon the past year's results.

- (14) Are there any other program effectiveness/evaluation measures you think are important, such as customer/client satisfaction surveys, quality of service measures, or other indicators? Please describe.

We use evaluation measures as appropriate to the activity being measured, and we are open to using others when practical, e.g., Likert surveys. ServTracker has been a valuable measurement tool especially when Covid-19 restrictions limited client feedback. It tracks individuals' status.



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

CHANGES/CHALLENGES

Challenge: Covid-19.

Because of the pandemic, MWNEI faced challenges that could have become unbeatable obstacles to its continued operations: MWNEI's received a skyrocketing number of persons requesting meals, food sources were scarce and unpredictable due to supply chain quirks; meal delivery schedules had to be drastically adjusted. Volunteers who were at high risk, were sidelined, new ones needed to be vetted and trained. At the same time, MWNEI was in the process of building its community kitchen, and it completed the project, yes, during the pandemic!

Response: New methods were adopted for integrating a soaring number of new clients quickly into our system and for delivering their meals to those in immediate need. Special overflow routes were mapped out while the paperwork was being processed. New volunteers were trained. Covid-19 restrictions were adopted. MWNEI staff learned to be agile, tolerate changes followed by more changes. In the face of disruptions to the regular order, staff morale was sustained.

Anticipated challenge: If threats of Covid-19 continue, we are in a better position to handle those issues.

Challenge: To integrate social services with meal deliveries. COVID prevented the full implementation of this expanding program. The program asks volunteers to observe clients during deliveries for changes in status and to record clients' conditions. But social distancing prevented volunteers from implementing the key element of the project.

Response: To compensate for limited client contact, seasoned volunteers phoned clients to help them feel safe and to identify emergency needs e.g., Covid-19 vaccinations. MWNEI arranged for clients who wanted them to receive vaccinations. As the pandemic subsides, volunteer-client relationships are resuming.

Anticipated challenge: As a result of the growing population of older persons with complex needs, MWNEI will be called upon to serve a rising number of clients.

Challenge: To raise public awareness of MWNEI's services in order to gain the support and participation of potential clients, volunteers, sponsors, donors, community partners, and others. More individuals then will be served; more revenue needs to be generated.

Response: MWNEI is strengthening its marketing/communications activities.

Anticipated challenge: To build greater organizational marketing capacity and carry out additional marketing activities such as direct mail, regular updating of the MWNEI website; social media, publicity, etc. to communicate to the public about MWNEI's extended services i.e., wellness check-ups, links with social services, free pet food.

Challenge: The enduring challenge is to raise funds, especially to cover subsidies for persons who cannot afford to pay for their meals. Forty years ago, more than two-thirds of MWNEI's clients paid full fare. Over the years, MWNEI's client subsidization grew to 60%. As a result of



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

the pandemic, it has risen to 80%. Funds for subsidies for low-income persons who need help paying for their food are being depleted.

Response: Creative and persistent searching for funds was necessary and bore fruit. Special grants were offered to agencies to address Covid-19 issues.

Anticipated challenges/changes in current year: The challenge to raise sufficient funds faces all not-for-profit organizations.



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

RECOMMENDATION RESPONSES

- (15) How did you respond to the recommendations made by New Trier Township, if any? Please describe in detail. (These are contained in the funding letter you received in June).

Recommendation: "... the Township would urge you to examine your fee scale and implement one in which the top end fee supports or nearly supports the costs of the meals and maximizes revenue while ensuring that low-income clients have adequate access to your services...."

Response: We have, indeed raised meal fees so that the top end nearly supports the food and packaging costs. However, we still work to enroll more clients who pay full fare so that subsidies can be eased.

Recommendation: "The Township hopes to see the overall number of Township clients increase this year."

Response: We are attempting to achieve just that. We have been increasing our marketing/communications activities to raise awareness among potential clients and their families about how MWNEI can serve them. We have been engaging in more direct mail, better use of social media, more publicity, and the like to reach more target markets. It takes time to persuade skeptical residents that our kitchen's exceptional meals are unlike the typical Meals on Wheels product.

RESOURCES/BUDGET



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

- (1) What non-financial resources are required to deliver this service? Specify staffing/volunteer requirements, budgetary needs and other resources, inputs, and/or community partners that are needed for this program. If the Township is unable to fund this program at the desired level, what will the impact be on services? Describe how your program will or will not continue without investment by the Township. Complete the attached budget forms. Were any cost reduction measures implemented in the prior year? If there is a sliding fee scale for this program, please attach it and indicate how many clients paid each fee level.

Required on-finance resources

Staffing

MWNEI is staffed with 6 full time employees. Bookkeeping services are contracted out. The full time Executive Director is responsible for supervising daily operations and planning. Her tasks also include developing relationships with referral sources, potential donors, and other community organizations. She also handles the bulk of the marketing assignments in addition to her many other management responsibilities.

Volunteers:

Currently about 800 volunteers work shifts throughout the day. At 8 a.m., a volunteer crew arrives to pack meals for delivery while another assists with food preparation. At 10 a.m., drivers begin delivering to our 23 service locations, including one driver each day who drives the MWNEI van to drop spots throughout the delivery area. A separate group of volunteers make phone calls to clients to ensure that social distancing doesn't mean isolation. Another group volunteers for the afternoon food prep shift. Volunteers also help provide administrative support such as phone calls, mailings, gardening, card making, and the like.

Some volunteers serve once a week or once a month, others only on weekends, still others are on standby. Each driver needs a valid driver's license and auto insurance; and must be at least 18 years old. All volunteers must also clear a background check.

Due to the pandemic, a number of older volunteers needed to take a pause. Because many individuals in the area were working from home, they had time to volunteer. To our surprise, they stepped up to volunteer, and fill the vacancies.

Budgetary needs

Additional funds will need to be raised. But the increase in the total number of persons served should bring our cost per unit into a more favorable range.

Is there a sliding fee scale?

Our sliding scale fee is based on 12% of the client's daily income. In cases of severe hardship, some individuals pay even less than is indicated.

How many clients paid at each fee level?

Using this guideline, we subsidized 75% of our clients last year at individualized rates.



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

If not funded

If the Township is unable to fund the program at the desired level, MWNEI will struggle with our already lean operations.

Cost reduction measures

MWNEI has always been very frugal and relies on low cost, high value volunteers to make the program affordable to implement. Food costs have been very high throughout the pandemic, which has presented many challenges.

iPads are being used much less for our client needs tracking and referral program as volunteers are opting to use the app on their phones instead. It is saving MWNEI a considerable amount of money in AT&T payments and has allowed the sale of many of the iPads.

With additional targeted marketing, we expect increasing revenues from additional clients paying the full fee. As the food prepared in the MWNEI kitchen more closely restaurant fare but is far less costly, we believe we will reach populations that had not considered Meals on Wheels fare in the past.

(2) If your program or agency budget request represents an increase from last year, please explain the reason for the change and what the increase will be used for. N/A



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

NEW TRIER TOWNSHIP			
ANNUAL FUNDING REQUEST FORM			

2022-2023 TOTAL AGENCY BUDGET FORM

AGENCY NAME: Meals at Home dba Meals on Wheels NE Illinois				
Indicate year in each column				
	2020-2021	2021-2022	2022-2023	
	YEAR	YEAR	YEAR	
AGENCY REVENUES				
New Trier Township	25,000	25,000	25,000	
Federal Government	0	0	0	
State Government	0	0	0	
Local Government/Townships	9,883	30000	30000	CDBG funding from City of Evanston
Client Fees	157,364	350,378	400,000	
Grants: Foundations, Corporate, Religious	269,373	433500	500,000	
Individual Contributions	430,477	485,000	500,000	
Special Events	76,735	0	0	included above
United Way	0	0	0	
Sales	0	18,000	50,000	
Other Revenues including in-kind	473,576	500,000	500,000	
TOTAL REVENUES	1,442,408	1,841,878	2,005,000	
AGENCY EXPENDITURES				
Program Staff Salaries, Benefits, Taxes	272,766	367,000	400,000	
Administrative Staff Salaries, Benefits, Taxes	38,128	78,000	100,000	
Fundraising Staff Salaries, Benefits, Taxes	50,857	98,800	100,000	
Professional Fees/Contractual Services	56,125	30,000	30,000	
General Operating Expenses	236470	196,817	200000	includes COGS



AGENCY/PROGRAM APPLICATION FOR FUNDING

Fiscal Year 2022-2023

Occupancy and Utilities	43,364	53,700	30,000	
Specific Assistance to Individuals	260,642	331,623	350,000	
Major and Minor Equipment	0	40000	40000	
Major Capital Expenses	0	0	0	
Other Fundraising Expenses	10,513	44,900	50,000	
Other/Miscellaneous	440,454	500,000	500,000	in-kind donations including volunteer hours, donated bakery (weekly), and client gifts
TOTAL EXPENDITURES	1,409,319	1,740,840	1,800,000	
SURPLUS (DEFICIT)	33,089	101,038	205,000	
NET GAIN/LOSS FROM OTHER FUNDS				
SURPLUS (DEFICIT)				
TOTAL FUNDRAISING/ADMIN COSTS	99,498	221,700	250,000	