



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director

**MEMORANDUM**

**TO:** AGING & ADULT SERVICES COMMISSION

**THROUGH:** SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

**FROM:** CINDY KAUFFMAN, DEPUTY DIRECTOR  
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *J4/*

**DATE:** OCTOBER 4, 2017

**SUBJECT:** **GRANT MODIFICATIONS: MULTIPLE GRANTEES (see table below) for NUTRITION SERVICES for SENIORS AND ADULTS WITH DISABILITIES**

<b>GRANT TERM:</b>	<u>Original</u>	<u>Modification</u>		
	<u>Term</u>	<u>Term</u>		
	7/1/17-	7/1/17-		
	6/30/20	6/30/20		
<b>GRANT AMOUNT:</b>	<u>Current</u>	<u>Modification</u>	<u>Contingency</u>	<u>Total</u>
	\$5,169,117	\$1,719,519	\$688,863	\$7,577,499
<b>ANNUAL MOD AMOUNT:</b>	<u>FY 17/18</u>	<u>FY 18/19</u>	<u>FY 19/20</u>	
	\$573,173	\$573,173	\$573,173	
<b>FUNDING SOURCE</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>
<b>MOD FUNDING:</b>	\$1,719,519			\$171,952
<b>PERCENTAGE:</b>	100%			100%

The Department of Aging and Adult Services (DAAS) requests authorization to modify various grant agreements with multiple non-profit providers for the provision of nutrition services to seniors and adults with disabilities for the period of July 1, 2017 to June 30, 2020. The total of the modified grant amounts plus a 10% contingency will not exceed \$7,577,499 and are detailed in the table below (on page 3).

**Background**

Adequate nutrition is critical to the health, functioning, and increased quality of life for San Francisco’s aging population. The Elderly Nutrition Program (ENP), authorized through Title III, under the Older Americans Act, is intended to improve the dietary intake of participants and to offer participants opportunities to create informal support networks. The legislative intent is to make community-based services available to older adults who may be at risk of losing their

independence. DAAS has provided ENP services since 1975. The ENP managed by the department is the largest elderly community nutrition services program in San Francisco.

In response to the food needs of seniors' and adults with disabilities, recommendations about diverse nutrition and food security, and the City's goal of ending hunger by 2020, the San Francisco Food Security Task Force presented an updated needs assessment report to the Board of Supervisors and Mayor in June 2017. As a result of the Task Force's recommendations, the Board and Mayor provided DAAS with a total of \$1,752,000 in ongoing and one-time-only (OTO) funding for the period 7/1/2017-6/30/2018. Additionally, there is \$100,000 from Dignity Fund to expand congregate meals for veterans under Centro Latino de San Francisco and Project Open Hand's contracts. Thus the total modification for 7/1/2017-6/30/2018 is \$1,852,000.

Office on Aging (OOA) used the following principles and guidelines for FY 17/18 Add Backs: restore service units to previously approved FY16/17 contract levels, allocate additional funds for over-served contracts, address other needs identified through DAAS needs assessment, and address recent program changes. OTO funds were based on special needs and Board of Supervisors' allocations for specific districts.

### **Services to be Provided**

Grantees will continue to provide hot meals at congregate meal sites located in various neighborhoods, and deliver hot, chilled and frozen meals to the homes of eligible individuals throughout the City. Grantees will also provide nutrition compliance services to meet the Title III-C requirements. Details of each affected agency's current and revised funding amounts are listed in the following table. The ENP meals service provision is regulated by California Retail Food Code (CRFC), Occupational Safety and Health Administration (OSHA) Code, and requirements stipulated in California Code of Regulations Title 22 Division 1.8 and Older Americans Act. The target populations for Congregate Meals are eligible seniors age 60 and above and adults with disabilities age 18-59. The target populations for Home-Delivered Meals (HDM) are eligible residents of San Francisco age 60 and above and adults with disabilities age 18-59. With the Add Back funds, DAAS expanded the following services:

- **Congregate meals for seniors:** Provides mostly lunch but also breakfast and dinner for seniors (age 60 and above) at congregate meal sites scattered across the city. The meals providers collectively cover multiple cultural cuisines and serve food daily; a smaller number of sites are open on weekends. Congregate meal services not only afford consumers optimal nutritional intake, but also provide a space for seniors and adults with disabilities to socialize and be active during the day. Per state-mandated requirements, DAAS meals providers must also receive regular kitchen monitoring, and offer a number of nutrition education sessions for the program participants each year. These services are delivered either by the provider itself, through an in-kind partnership with City College of San Francisco's Adult Education Program, through an independent nutritionist contractor, or through the citywide nutrition education contractors. With the Add Back funds, DAAS increased nutrition counseling services in order to better meet the projected needs.

- **Congregate meals for adults with disabilities (AWD):** Congregate meal sites in focused areas specializing in meals serving adults with disabilities. Of the thirteen providers who serve congregated meals to seniors, seven of them provide congregated meals to both seniors and adults with disabilities.
- **HDM service to adults with disabilities (AWD):** Adults with disabilities who are non-ambulatory and meet the HDM eligibility requirements are eligible to receive home-delivered meals. Eligibility assessments and follow-ups for consumers of any AWD HDM provider are centrally performed by one grantee. DAAS increased significant funds to this program in order to meet the high program demands.

**Explanation of funding**

The total annual modification amount for the nutrition contracts through add-backs (\$1,727,000) and Dignity Fund (\$100,000) is \$1,827,000, and there is a one-time-only add-back of \$25,000 for FY 17/18. Of the \$1,852,000 total, \$573,173 in annual modification funds pertaining to nine modifications (as shown below) are ready to come before the October 4, 2017 DAAS Commission meeting (\$573,173x3=\$1,719,519 total for FY 17-20). DAAS is negotiating with CBO's to enhance their programs. The remaining annual modification of \$1,278,827 (\$1,852,000-\$573,173) is not included in this request and of this amount \$825,000 in modifications will be brought to the November 2017 DAAS Commission meeting. The remaining modifications of \$453,827 (\$1,278,827-\$825,000) will be added through contingency amounts previously approved by the Commission.

**ENP Congregate Meals**

Agency	Current FY17-20 Amount	Annual MOD Award Amount	Fiscal Year (FY) 17-20 Total MOD Amount	Revised FY 17-20 Amount	FY 17-20 Total Not-To-Exceed with 10% Contingency
Candice Tang	\$41,400	\$1,500	\$4,500	\$45,900	\$50,490
Centro Latino de San Francisco	\$983,460	\$108,608	\$325,824	\$1,309,284	\$1,440,212
Glide	\$395,166	\$49,203	\$147,609	\$542,775	\$597,053
Leah's Pantry: Citywide Nutrition Counseling & Ed.	\$158,502	\$23,570	\$70,710	\$229,212	\$252,133
Project Open Hand: Citywide Nutrition Counseling & Education	\$68,151	\$20,000	\$60,000	\$128,151	\$140,966
<b>Total</b>	<b>\$1,646,679</b>	<b>\$202,881</b>	<b>\$608,643</b>	<b>\$2,255,322</b>	<b>\$2,480,854</b>

**AWD Congregate Meals**

<b>Agency</b>	<b>Current FY17-20 Amount</b>	<b>Annual MOD Award Amount</b>	<b>Fiscal Year (FY) 17-20 Total MOD Amount</b>	<b>Revised FY 17-20 Amount</b>	<b>FY 17-20 Total Not-To-Exceed with 10% Contingency</b>
Centro Latino de San Francisco	\$112,539	\$40,440	\$121,320	\$233,859	\$257,245
Project Open Hand	\$521,694	\$51,852	\$155,556	\$677,250	\$744,975
<b>Total</b>	<b>\$634,233</b>	<b>\$92,292</b>	<b>\$276,876</b>	<b>\$911,109</b>	<b>\$1,002,220</b>

**AWD Home-Delivered Meals**

<b>Agency</b>	<b>Current FY17-20 Amount</b>	<b>Annual MOD Award Amount</b>	<b>Fiscal Year (FY) 17-20 Total MOD Amount</b>	<b>Revised FY 17-20 Amount</b>	<b>FY 17-20 Total Not-To-Exceed with 10% Contingency</b>
Meals on Wheels	\$2,316,942	\$215,057	\$645,171	\$2,962,113	\$3,258,324
Self-Help for the Elderly	\$571,263	\$62,943	\$188,829	\$760,092	\$836,101
<b>Total</b>	<b>\$ 2,888,205</b>	<b>\$278,000</b>	<b>\$834,000</b>	<b>\$3,722,205</b>	<b>\$4,094,425</b>
<b>Grand Total (All Add Backs)</b>	<b>\$5,169,117</b>	<b>\$ 573,173</b>	<b>\$1,719,519</b>	<b>\$6,888,636</b>	<b>\$7,577,499</b>

**Grantee Performance**

- Fiscal Monitoring**  
All providers were fiscally monitored for fiscal year 2016-17. The Human Services Agency did not find any significant findings during its annual fiscal monitoring.
- Program Monitoring**  
All service providers were monitored during the months of March and April of 2017 with no significant findings. All providers are in compliance.

**Selection**

Grantees were selected through RFP #715 issued in January 2017.

**Funding**

The modification of these grants will be funded entirely through County funds.

## **Attachments**

### **Candice Tang**

- Appendix A.1 - Services to be Provided (ENP Nutrition Compliance)
- Appendix B.1 – Calculation of Charges – (ENP Nutrition Compliance)

### **Centro Latino de San Francisco**

- Appendix A3 – Services to be Provided – (ENP Congregate Meals)
- Appendix B4 – Calculation of Charges – (ENP Congregate Meals)

### **Glide Foundation**

- Appendix A-2 – Services to be Provided – (ENP Congregate Meals)
- Appendix B-2 – Calculation of Charges – (ENP Congregate Meals)

### **Leah's Pantry**

- Appendix A-3– Services to be Provided – (Citywide Nutrition Education & Counseling Services for Congregate Meals Program)
- Appendix B-3 – Calculation of Charges – (Citywide Nutrition Education & Counseling Services for Congregate Meals Program)

### **Project Open Hand**

- Appendix A-5– Services to be Provided – (Citywide Nutrition Education & Counseling Services for Congregate Meals Program)
- Appendix B-5 – Calculation of Charges – (Citywide Nutrition Education & Counseling Services for Congregate Meals Program)

### **Centro Latino de San Francisco**

- Appendix A4 – Services to be Provided – (AWD Congregate Meals)
- Appendix B5 – Calculation of Charges – (AWD Congregate

### **Project Open Hand**

- Appendix A6 – Services to be Provided – (AWD Congregate Meals)
- Appendix B6 – Calculation of Charges – (AWD Congregate Meals)

### **Meals on Wheels of San Francisco**

- Appendix A3 – Services to be Provided – (AWD Home Delivered Meals)
- Appendix B4 – Calculation of Charges – (AWD Home Delivered Meals)

### **Self-Help for the Elderly**

- Appendix A4 – Services to be Provided – (AWD Home Delivered Meals)
- Appendix B7 – Calculation of Charges – (AWD Home Delivered Meals)

**Appendix A.1 - Services to be Provided  
Candice Tang, R.D.**

**Nutrition Compliance for Elderly Nutrition Program (ENP)  
Congregate and Home-Delivered Meals Programs  
July 1, 2017– June 30, 2020**

**I. Purpose**

The purpose of this contract is to provide the services of a Registered Dietitian to assist DAAS funded nutrition agencies to be in compliance with food service safety and other federal, state and local nutrition program requirements for congregate and home-delivered meals program.

**II. Definitions**

Grantee	Candice Tang
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
CRFC	California Retail Food Code establishes uniform health and sanitation standards for retail food facilities for regulation by the State Department of Public Health, and requires local health agencies to enforce these provisions.
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Aging and Adult Services
ENP	Elderly Nutrition Program (ENP), a program which provides nutrition services, as authorized by the Older Americans Act of 1965, as amended, and which shall be provided in accordance with Title 22 regulations.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans(DGA), published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide (a) A minimum of one-third of the Dietary Reference Intakes (DRI) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the grantee provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the grantee provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points, monitoring and documenting practices and taking corrective actions when failure to meet critical limits is detected.
HSA	Human Services Agency of the City and County of San Francisco
Low-Income	At or below 100% of federal poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the Dietary Reference Intakes (DRI for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, saturated fat, fiber, calcium, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, and vitamin B12.
Minority	An ethnic person of color who is any of the following:  a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Nutrition Counseling	Provision of individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status, performed by a Registered Dietitian in accordance with Sections 2585 and 2586, Business and Professions Code.

Nutrition Education	Providing nutrition program consumers current facts and information which will promote improved food selection, eating habits, nutrition, health promotion, and disease prevention practices. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education plan and services shall be approved by a Registered Dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a RD. Nutrition education services shall be based on the needs of the consumers as determined by annual consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. The nutrition education activities shall be provided on quarterly basis and documented.
Nutrition Screening	The completion of a nutrition screening checklist by eligible consumers to determine if they are at nutrition risk. A nutrition screening checklist is a federal public information collection requirement in the National Aging Program Information System (NAPIS), found in the Federal Register, Volume 59, No. 188, September 29, 1994.
OOA	Office on the Aging
Registered Dietitian (RD) Registered Dietitian Nutritionist (RDN)	Registered Dietitian or Registered Dietitian Nutritionist: An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration. A Registered Dietitian (R.D.) shall be covered by professional liability insurance either individually (if a consultant) or through Grantee.
Title 22 Regulations	Refers to Barclay’s official California Code of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program. <a href="http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/">http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/</a>

### III. SERVICES TO BE PROVIDED

- A. Grantee will assist the selected DAAS-funded nutrition agencies to meet the nutrition and food service standards set forth by Title 22 Regulations, California Department of Aging and Office on the Aging, ensuring the provision of quality meals that meet nutrition, HACCP and food safety standards, and enabling meal program participants to reduce incidences of chronic diseases and maintain independent living.
- B. Grantee will provide Nutrition compliance components and service units as indicated in Appendix B (detailed in Attachment A) and agreed between the grantee, Registered Dietitian and the four DAAS-funded nutrition agencies: Episcopal Community Service, Central Latino Community Services, Jewish Family and Children’s Services, and Russian



American Community Services. The Registered Dietitian will provide technical assistance to the nutrition agencies:

- 1) Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC Cal Code).
  - 2) Conduct site visit to monitor the safety and sanitation components of the nutrition program. A HACCP safety and sanitation monitoring for the production kitchen and meal site must be conducted on site and documented at least four times a year by a R.D. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA and nutrition agency on a timely basis.
  - 3) Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
  - 4) Nutrition education provision including providing assistance to agency on gathering annual nutrition education assessment data, if needed.
- C. Grantee will ensure adequate and culturally competent Registered Dietitian to service the nutrition agencies.
- D. Grantee will attend the quarterly in-service training coordinated and provided by the OOA and share the relevant information with nutrition agency's staff and volunteers.
- E. Grantee will have a signed Agreement to collaborate with the designated nutrition agencies to clarify the expectations and responsibilities between the parties involved and share a copy with DAAS-OOA.
- F. Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. See Appendix F and Exhibit E.
- G. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.

#### **IV. Service Objectives**

On an annual basis:

- A. Grantee will provide nutrition compliance and quality assurance services to four DAAS-funded nutrition contractors.
- B. Grantee will provide nutrition compliance units as indicated in Appendix B.

#### **V. Outcome Objectives**

- A. To provide consulting services that attains a high satisfaction level from the DAAS designated nutrition agencies. These agencies will have the resources needed to be in compliance with the nutrition program standards.
- B. Submit quarterly HACCP safety and sanitation monitoring reports within 14 days after the site visits are conducted.
- C. Based on an annual satisfaction survey, at least 85% of participating agencies are satisfied with the technical assistance services delivered.

- D. Based on an annual satisfaction survey, at least 85% of participating agencies are satisfied with the training services delivered.

**VI. Monitoring Activities**

- A. Nutrition Program Monitoring: Program monitoring will include review of all the nutrition monitoring reports in accordance with Title 22, CRFC, California Department of Aging and DAAS nutrition standards, food/meal service and kitchen operation policies and procedures, menu and nutrient analysis, nutrition education policies, back up documentation for the units of service and all reporting, and progress of service and outcome objectives.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**VII. Reporting Requirements**

- A. Grantee will submit appropriate documentation of the nutrition monitoring visits to OOA and the nutrition agency by the scheduled due dates.
- B. Grantee will submit menu and nutrient analysis as specified in the service units.
- C. Grantee will provide a quarterly report of number of services provided as described in Section IV – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of nutrition compliance units provided.
- D. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- E. Grantee will provide other reports as requested.
- F. Apart from the on-line reporting via CaGetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Elena Baranoff (Worker #GB24)  
Senior Contract Manager/HSA  
P.O. Box 7988  
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**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

Contractor Name: Candice Tang  
Term: July 1, 2017 to June 30, 2020

(Check One) New  Renewal  Modification  X  
If modification, Effective Date of Mod. No. of Mod. 1

9 Program: Nutrition Compliance	REVENUE Cost Allocation:			REVENUE Cost Allocation:			REVENUE Cost Allocation:			Total Revenue
10 Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Year 2	H.S.A.-DAAS	Non-HSA-DAAS	Year 3	H.S.A.-DAAS	Non-HSA-DAAS	7/1/17 to 6/30/20
11 Program Term	7/1/17-6/30/18			7/1/18-6/30/19			7/1/19-6/30/20			
12 Expenditures										
13 Nutrition Education										
14 Salaries & Benefits	\$1,200	\$1,200		\$1,200	\$1,200		\$1,200	\$1,200		\$3,600
15 Operating Expense	\$300	\$300		\$300	\$300		\$300	\$300		\$900
16 Subtotal Direct	\$1,500	\$1,500		\$1,500	\$1,500		\$1,500	\$1,500		\$4,500
17 Indirect Percentage										
18 Indirect Expense										
19 Total Nutrition Education	\$1,500	\$1,500		\$1,500	\$1,500		\$1,500	\$1,500		\$4,500
20 Nutrition Counseling										
21 Salaries & Benefits										
22 Operating Expense										
23 Subtotal Direct										
24 Indirect Percentage										
25 Indirect Expense										
26 Total Nutrition Counseling										
27 HACCP Kitchen Monitoring										
28 Salaries & Benefits	\$4,536	\$4,536		\$4,536	\$4,536		\$4,536	\$4,536		\$13,608
29 Operating Expense	\$264	\$264		\$264	\$264		\$264	\$264		\$792
30 Subtotal Direct	\$4,800	\$4,800		\$4,800	\$4,800		\$4,800	\$4,800		\$14,400
31 Indirect Percentage										
32 Indirect Expense										
33 Total HACCP Kitchen Monitoring	\$4,800	\$4,800		\$4,800	\$4,800		\$4,800	\$4,800		\$14,400
34 Site/Route Monitoring										
35 Salaries & Benefits	\$4,985	\$4,985		\$4,985	\$4,985		\$4,985	\$4,985		\$14,955
36 Operating Expense	\$265	\$265		\$265	\$265		\$265	\$265		\$795
37 Subtotal Direct	\$5,250	\$5,250		\$5,250	\$5,250		\$5,250	\$5,250		\$15,750
38 Indirect Percentage										
39 Indirect Expense										
40 Total Site/Route Monitoring	\$5,250	\$5,250		\$5,250	\$5,250		\$5,250	\$5,250		\$15,750
41 Menu Planning										
42 Salaries & Benefits	\$2,587	\$2,587		\$2,587	\$2,587		\$2,587	\$2,587		\$7,761
43 Operating Expense	\$213	\$213		\$213	\$213		\$213	\$213		\$639
44 Subtotal Direct	\$2,800	\$2,800		\$2,800	\$2,800		\$2,800	\$2,800		\$8,400
45 Indirect Percentage										
46 Indirect Expense										
47 Total Menu Planning	\$2,800	\$2,800		\$2,800	\$2,800		\$2,800	\$2,800		\$8,400
48 HDM Assessments										
49										
50										
51										
52 Other Nutrition Compliance										
53 Salaries & Benefits	\$756	\$756		\$756	\$756		\$756	\$756		\$2,268
54 Operating Expense	\$194	\$194		\$194	\$194		\$194	\$194		\$582
55 Subtotal Direct	\$950	\$950		\$950	\$950		\$950	\$950		\$2,850
56 Indirect Percentage										
57 Indirect Expense										
58 Total Other Nutrition Compliance	\$950	\$950		\$950	\$950		\$950	\$950		\$2,850
59 GRAND Total Expenditures	\$15,300	\$15,300		\$15,300	\$15,300		\$15,300	\$15,300		\$45,900
60 HSA Revenues										
61										
62										
63 TOTAL HSA REVENUES										
64 Other Non-H.S.A.-DAAS										
65 Revenues										
66										
67										
68 TOTAL OTHER REVENUES										
69 Full Time Equivalent (FTE)										
70										
71 Prepared by: Candice Tang, RD Telephone No.: 415-812-5123 Date										
72 HSA-CO Review Signature: _____										
73 HSA #1										

Nutrition Education Salaries & Benefits Detail

Line #	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O																								
																Agency Totals	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	Total Revenue														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38		
Annual Full Time Salary for FTE	Total % FTE	Adjusted FTE	% FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue																							
Program: Nutrition Compliance for ENP Congregate (Same as Line 9 on HSA #1)																																							
TERM																																							
July 1, 2017 to June 30, 2020																																							
POSITION TITLE																																							
Candice Tang RD	\$84,000	30%	1%	5%	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$3,600																							
TOTALS	\$84,000	30%	1%	5%	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$3,600																							
FRINGE BENEFIT RATE																																							
EMPLOYEE FRINGE BENEFITS																																							
TOTAL SALARIES & BENEFITS	\$84,000				\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$3,600																							
Program x3yrs	\$3,600																																						
HSA #2																																							

Program: Nutrition Compliance for ENP Congregate  
(Same as Line 9 on HSA #1)

Nutrition Education Operating Expense Detail

TERM	Year 1 7/1/17-6/30/18	Year 2 7/1/18-6/30/19	Year 3 7/1/19-6/30/20	REVENUE Cost Allocation: H.S.A.-DAAS	REVENUE Cost Allocation: DAAS	REVENUE Cost Allocation: H.S.A.-DAAS	REVENUE Cost Allocation: DAAS	TOTAL REVENUE 7/1/17 to 6/30/20
12 Expenditure Category								
13 Rental of Property	\$71	\$71	\$71	\$71	\$71	\$71	\$71	\$214
14 Utilities(Elec, Water, Gas, Phone, Scavenger)	\$29	\$29	\$29	\$29	\$29	\$29	\$29	\$86
15 Office Supplies, Postage	\$36	\$36	\$36	\$36	\$36	\$36	\$36	\$107
16 Building Maintenance Supplies and Repair	\$36	\$36	\$36	\$36	\$36	\$36	\$36	\$107
17 Printing and Reproduction	\$29	\$29	\$29	\$29	\$29	\$29	\$29	\$86
18 Insurance	\$57	\$57	\$57	\$57	\$57	\$57	\$57	\$171
19 Staff Training								
20 Staff Travel	\$43	\$43	\$43	\$43	\$43	\$43	\$43	\$129
21 Small Equipment (over \$500 but under \$5,000/item)								
22 Rental of Equipment								
24 SUBCONTRACTORS Descriptive Title								
25 a								
26 b								
27 c								
28 d								
29 e								
30 OTHER								
31 z								
32 y								
33 x								
34 w								
35 v								
36								
37 TOTAL OPERATING EXPENSE	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$900
38 TOTAL OPERATING EXPENSE x3yrs	\$900							
39 HSA #3								







	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O			
1	Appendix B.1, Page 6																	
2	Document Date: 9/13/17																	
3																		
4	Program: Nutrition Compliance for ENP Congregate																	
5	(Same as Line 9 on HSA #1)																	
6																		
7																		
8	TERM:																	
9	July 1, 2017 to June 30, 2020																	
10	Site or Route Monitoring Salaries & Benefits Detail																	
11	Agency Totals	Annual Full	Total %	For HSA Program % FTE	Adjusted	6%	7/1/17-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	7/1/17 to 6/30/20	REVENUE Cost Allocation: H.S.A.-	REVENUE Cost Allocation: Non-HSA-	For HSA Program Budgeted Salary	For HSA Program Budgeted Salary	REVENUE Cost Allocation: H.S.A.-	REVENUE Cost Allocation: Non-HSA-	Total Revenue	
12		\$84,000	30%	20%			\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$14,955	
13	Position Title																	
14	Candice Tang, RD																	
15																		
16																		
17																		
18																		
19																		
20																		
21																		
22																		
23																		
24																		
25																		
26																		
27																		
28																		
29																		
30	TOTALS	\$84,000	0.30	0.20	0.06		\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$14,955	
31	FRINGE BENEFIT RATE																	
32	EMPLOYEE FRINGE BENEFIT																	
33																		
34																		
35																		
36	TOTAL SALARIES & BENEFITS	\$84,000					\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$4,985	\$14,955	
37	TOTAL SALARIES & BENEFITS	\$14,955																
38	HSA #8																	

Program: Nutrition Compliance for ENP Congregate  
(Same as Line 9 on HSA #1)

Site or Route Monitoring Operating Expense Detail

TERM:  
July 1, 2017 to June 30, 2020

Expenditure Category	Year 1 7/1/17-6/30/18		Year 2 7/1/18-6/30/19		Year 3 7/1/19-6/30/20		REVENUE Cost Allocation: H.S.A. - Non-HSA-		TOTAL REVENUE 7/1/17 to 6/30/20
	H.S.A.-DAAS	Non-HSA-	H.S.A.-	Non-HSA-	H.S.A.-	Non-HSA-	H.S.A.-	Non-HSA-	
14 Rental of Property	\$53		\$53		\$53		\$53		\$160
15 Utilities(Elec, Water, Gas, Phone, Scavenger)	\$36		\$36		\$36		\$36		\$109
16 Office Supplies, Postage	\$27		\$27		\$27		\$27		\$80
17 Building Maintenance Supplies and Repair	\$11		\$11		\$11		\$11		\$32
18 Printing and Reproduction	\$27		\$27		\$27		\$27		\$80
19 Insurance									
20 Staff Training									
21 Staff Travel	\$112		\$112		\$112		\$112		\$335
22 Small Equipment (over \$500 but under \$5,000)									
23 Rental of Equipment									
24									
25 SUBCONTRACTORS Descriptive Title									
26 a									
27 b									
28 c									
29 d									
30 e									
31 OTHER									
32 z									
33 y									
34 x									
35 w									
36 v									
37									
38 TOTAL OPERATING EXPENSE	\$265		\$265		\$265		\$265		\$795
39 TOTAL OPERATING EXPENSE x3yrs	\$795		\$795		\$795		\$795		\$795

Program: Nutrition Compliance for ENP Congregate  
 (Same as Line 9 on HSA #1)

Menu Planning Salaries & Benefits Detail

TERM:  
 July 1, 2017 to June 30, 2020

POSITION TITLE	7/1/17-6/30/18		7/1/18-6/30/19		7/1/19-6/30/20		7/1/17 to 6/30/20		
	Agency Totals	For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program	REVENUE Cost Allocation	REVENUE Cost Allocation	
Annual Full	Total %	% FTE	Adjusted	Budgeted Salary	Budgeted Salary	Budgeted Salary	H.S.A.-	Non-HSA-	
Candice Tang, RD	\$84,000	30%	10%	3%	\$2,587	\$2,587	\$2,587	\$2,587	\$7,761
TOTALS	\$84,000	30%	10%	3%	\$2,587	\$2,587	\$2,587	\$2,587	\$7,761
FRINGE BENEFIT RATE									
EMPLOYEE FRINGE BENEFITS									
TOTAL SALARIES & BENEFITS	\$84,000						\$2,587	\$2,587	\$7,761
TOTAL SALARIES & BENEFITS for H.S.A	\$7,761						\$2,587	\$2,587	\$7,761

HSA #10



Program: Nutrition Compliance for ENP Congregate  
 (Same as Line 9 on HSA #1)

Other Nutrition Compliance Salaries & Benefits Detail

TERM:

July 1, 2017 to June 30, 2020

POSITION TITLE	Agency Totals Annual Full	Total %	For HSA Program % FTE	Adjusted	7/1/17-6/30/18		7/1/18-6/30/19		7/1/19-6/30/20		7/1/17 to 6/30/20	
					For HSA Program Budgeted Salary	Non-HSA- H.S.A.-	For HSA Program Budgeted Salary	Non-HSA- H.S.A.-	For HSA Program Budgeted Salary	Non-HSA- H.S.A.-	REVENUE Cost Allocation H.S.A.-	Non-HSA- H.S.A.-
Candice Tang, RD	\$84,000	30%	3%	1%	\$756	\$756	\$756	\$756	\$756	\$756	\$756	\$2,268
TOTALS	\$84,000	30%	3%	1%	\$756	\$756	\$756	\$756	\$756	\$756	\$756	\$2,268
FRINGE BENEFIT RATE												
EMPLOYEE FRINGE BENEFITS												
TOTAL SALARIES & BENEFITS	\$84,000				\$756	\$756	\$756	\$756	\$756	\$756	\$756	\$2,268
TOTAL SALARIES & BENEFITS for H.S.A	\$2,268											\$2,268

HSA #14



**Appendix A3 - Services to be Provided  
Centro Latino de San Francisco**

**Elderly Nutrition Program (ENP) Congregate Meals  
July 1, 2017 – June 30, 2020**

**I. Purpose**

The purpose of this grant is to assist older individuals and those identified by Grantee as its target population to live independently, by promoting better health through improved nutrition, and reduced isolation through accessible and appropriate meal services.

**II. Definitions**

Grantee	Centro Latino de San Francisco.
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
CRFC	California Retail Food Code establishes uniform health and sanitation standards for retail food facilities for regulation by the State Department of Public Health, and requires local health agencies to enforce these provisions.
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Aging and Adult Services
ENP	Elderly Nutrition Program (ENP), a program which provides nutrition services, as authorized by the Older Americans Act of 1965, as amended, and which shall be provided in accordance with Title 22 regulations.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans(DGA), published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide (a) A minimum of one-third of the Dietary Reference Intakes (DRI) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the grantee provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the grantee provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points, monitoring and documenting practices and taking corrective actions when failure to meet critical limits is detected.
HSA	Human Services Agency of the City and County of San Francisco
Low-Income	At or below 100% of federal poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the Dietary Reference Intakes (DRI) for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, saturated fat, fiber, calcium, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, and vitamin B12.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Nutrition Counseling	Provision of individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status, performed by a Registered Dietitian in accordance with Sections 2585 and 2586, Business and Professions Code.



Nutrition Education	Providing nutrition program consumers current facts and information which will promote improved food selection, eating habits, nutrition, health promotion, and disease prevention practices. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education plan and services shall be approved by a Registered Dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a RD. Nutrition education services shall be based on the needs of the consumers as determined by annual consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. The nutrition education activities shall be provided on quarterly basis and documented.
Nutrition Screening	The completion of a nutrition screening checklist by eligible consumers to determine if they are at nutrition risk. A nutrition screening checklist is a federal public information collection requirement in the National Aging Program Information System (NAPIS), found in the Federal Register, Volume 59, No. 188, September 29, 1994.
OOA	Office on the Aging
Registered Dietitian (RD) Registered Dietitian Nutritionist (RDN)	Registered Dietitian or Registered Dietitian Nutritionist: An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration. A Registered Dietitian (R.D.) shall be covered by professional liability insurance either individually (if a consultant) or through Grantee.
SOGI	Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )
Title 22 Regulations	Refers to Barclay's official California Code of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program. <a href="http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/">http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/</a>

**III. Target Population**

The target population is residents of San Francisco County, age 60 and older. OOA targets individuals who have the greatest economic and social need such as living on low-income, are minorities, possessing non- or limited-English skills, or are lesbian/gay/bisexual/transgender.

**IV. Eligibility for Services**

To participate in Congregate Meal Program, an individual must meet either one of the following criteria:

- A senior, defined as an individual age 60 or older
- Spouse or domestic partner of a senior enrolled in the program
- An individual under the age of 60, with a disability who resides in housing facilities occupied primarily by older adults at which the congregate meal program is located
- A disabled individual who resides at home with and accompanies a senior who participates in the program. A volunteer under the age of 60 who helps in the meal program if doing so will not deprive a senior of a meal

**V. Services to be Provided**

- A. Develop and maintain nutrition policies and procedures that are in compliance with and meet the nutrition and food service standards set forth by Title 22 Regulations, CDA, and OOA Policies to ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling consumers to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
  1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
  2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the ENP menu requirements.
  3. Provide at least one session per quarter of nutrition education to consumers. The total units of nutrition education will be, at minimum, as shown on the DAAS-OOA approved Site Chart. The service units will be reported in CA-GetCare in the month that the service is provided. One unit of nutrition education is defined as one nutrition presentation to one consumer.
  4. A nutrition screening using the “Determine Your Nutritional Health” checklist is conducted annually for each consumer and documented in CA-GetCare within one month of obtaining the consumer’s nutrition risk screening.
  5. The donation rate per meal requested of each consumer must be approved by the Grantee’s Board of Directors and in compliance with OOA policy memoranda.
  6. Service Units:

Table A	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	1,258	1,258	1,258	3,774
#Meals	59,299	64,752	64,752	188,803

- C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented by a RD based on the number of monitoring approved in the Grantee’s

budget. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis and no later than once per quarter.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist as defined by OOA policy memoranda. The survey tool will be provided by OOA on an annual basis.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.

#### **VI. Service Objectives**

- A. Grantee will serve the total number of unduplicated consumers as indicated in Table A in Section V.
- B. Grantee will provide the total number of meals as indicated in Table A.
- C. Grantee will provide nutrition education to consumers in a group setting, a minimum of one nutrition education session per quarter at each site.

#### **VII. Outcome Objectives**

- A. At least 85% of consumers will report being satisfied with the meal quality as defined as "Excellent or Good" in the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee's average number of meals served at each congregate meal site.
- B. At least 75% of the consumers will report that the meal service helps maintain their independence based on the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee's average number of meals served at each congregate meal site.
- C. At least 65% of consumers will report an increase in the consumption of fruits and vegetables as evidenced by reported change from previous baseline data in the Nutrition Risk Screening Tool or other appropriate evaluation data.
- D. At least 65% of consumers with a high nutrition risk score as defined by the "Determine Your Nutritional Health" checklist will be connected to additional and appropriate resources.
- E. At least 65% of consumers that are identified as "lonely" as evidenced by the DAAS adopted loneliness screening tool will be connected to additional and appropriate resources.

## VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC, CDA nutrition service standards, and DAAS policies. This includes project income policies, nutrition education policies, consumer eligibility and targeted mandates, documentation for the units of service and all reporting, and progress of service and outcome objectives; how consumer records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, verification that hours of operation are reflected with in most recent approved site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA nutrition program standards.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

## IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare data obtained from consumers using the intake form for Congregate Meals, which includes the annual Nutrition Risk Screening, the loneliness screening, and the food security questions for all enrolled consumers by the due date as specified by OOA policy and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all consumer level service units in the Service Recording Tool and data for monthly service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives.
- D. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of meals served and number of nutrition compliance units provided.
- E. Grantee will enter the annual Outcome Objective metrics identified in Section VII of the appendix A in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 (or as amended) each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- G. Grantee will develop and maintain its OOA approved Site Chart. The site chart may be updated with the approval of OOA. A copy of the updated Site Chart will be kept in OOA's contractor program.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- I. Grantee will provide other reports as requested. Apart from the on-line reporting via Ca-GetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract

Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

David Kashani  
Contracts Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120  
[David.Kashani@sfgov.org](mailto:David.Kashani@sfgov.org)

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San Francisco, CA 94103  
[Sarah.Chan@sfgov.org](mailto:Sarah.Chan@sfgov.org)

	A	B	C	D	E	F	G	H	I	J	K	L		
1	BUDGET FORMS										Appendix B4, pg. 1			
2	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES										Document Date:	9/13/2017		
3	BUDGET SUMMARY													
4	Grantee's Name: Centro Latino de San Francisco, Inc.										Grant Term			
5	(Check One)	New	Renewal	Modification	X									
6														
7	Effective Date of Mod:	7/01/17	No. of	cong- ENP 7/1/17 to 6/30/18			cong- ENP 7/1/18 to 6/30/19			cong- ENP 7/1/19 to 6/30/20			7/1/17 to 6/30/20	Average cost/meal
8	Program	Congregate-ENP	Original	Modification	Revised	Original	Modification	Revised	Original	Modification	Revised	TOTAL		
9	Annual #Meals Contracted		48638	10661	59299	48638	16114	64752	48638	16114	64752	188803		
10	Program Term		7/1/17 to 6/30/18			7/1/18 to 6/30/19			7/1/19 to 6/30/20			7/1/17 to 6/30/20		
11	<b>Expenditures</b>													
12	Salaries & Benefits		\$224,405	\$65,074	\$289,478	\$224,405	\$89,011	\$313,416	\$224,405	\$89,011	\$313,416	\$916,310	\$4.85	
13	Operating Expense		\$103,414	\$6,787	\$110,201	\$103,414	\$19,598	\$123,012	\$103,414	\$19,598	\$123,012	\$356,226	\$1.89	
14	Subtotal		\$327,820	\$71,859	\$399,678	\$327,820	\$108,608	\$436,428	\$327,820	\$108,608	\$436,428	\$1,272,534	\$6.74	
15	Indirect Percentage (max 10%)													
16	Indirect Cost (Line 14 X Line 13)													
17	Capital Expenditure													
18	OTO			\$36,750	\$36,750		\$0					\$36,750		
19	TOTAL DAAS EXPENDITURES		\$327,820	\$108,608	\$436,428	\$327,820	\$108,608	\$436,428	\$327,820	\$108,608	\$436,428	\$1,309,284	\$6.74	
20														
21	<b>Non-DAAS Expenditures</b>													
22	Salaries & Benefits		\$33,785	\$0	\$33,785	\$33,785	\$0	\$33,785	\$33,785	\$0	\$33,785	\$101,355	\$0.54	
23	Operating Expense		\$81,683	\$7,870	\$89,553	\$81,683	\$11,895	\$93,578	\$81,683	\$11,895	\$93,578	\$276,710	\$1.47	
24	Capital Expenditure		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00	
25	TOTAL Non-DAAS EXPENDITURES		\$115,468	\$7,870	\$123,338	\$115,468	\$11,895	\$127,363	\$115,468	\$11,895	\$127,363	\$378,065	\$2.00	
26														
27	TOTAL DAAS & Non-DAAS EXPENDITURES		\$443,288	\$116,478	\$559,766	\$443,288	\$120,503	\$563,791	\$443,288	\$120,503	\$563,791	\$1,687,349	\$8.74	
28														
29	<b>HSA-DAAS Revenues</b>													
30	Meals		\$327,820	\$71,858	\$399,678	\$327,820	\$108,608	\$436,428	\$327,820	\$108,608	\$436,428	\$1,272,534		
31	OTO			\$36,750	\$36,750							\$36,750		
32														
33														
34														
35	TOTAL HSA-DAAS REVENUES		\$327,820	\$108,608	\$436,428	\$327,820	\$108,608	\$436,428	\$327,820	\$108,608	\$436,428	\$1,309,284		
36	PER MEAL COST, HSA-DAAS		\$6.74		\$6.74			\$6.74			\$6.74	\$6.74		
37	<b>Non-DAAS Revenues</b>													
38	Project Income		\$35,904	\$7,869	\$43,773	\$35,904	\$11,894	\$47,798	\$35,904	\$11,894	\$47,798	\$139,370	\$0.74	
39	Agency Cash - Fundraising		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00	
40	Agency In-Kind Volunteer		\$33,785	\$0	\$33,785	\$33,785	\$0	\$33,785	\$33,785	\$0	\$33,785	\$101,355	\$0.54	
41	Facility Rental In-Kind		\$45,779	\$1	\$45,780	\$45,779	\$1	\$45,780	\$45,779	\$1	\$45,780	\$137,340	\$0.73	
42														
43														
44	TOTAL NON HSA-DAAS REVENUES		\$115,468	\$7,870	\$123,338	\$115,468	\$11,895	\$127,363	\$115,468	\$11,895	\$127,363	\$378,065		
45	PER MEAL COST, NON HSA-DAAS		\$2.37		\$2.08	\$2.37		\$1.97	\$2.37		\$1.97	\$2.00		
46	TOTAL REVENUES		\$443,288	\$116,478	\$559,766	\$443,288	\$120,503	\$563,791	\$443,288	\$120,503	\$563,791	\$1,687,349		
47	PER MEAL COST, TOTAL		\$9.11		\$9.44	\$9.11		\$8.71	\$9.11		\$8.71	\$8.94		
48														
49	Full Time Equivalent (FTE)													
50														
51	Prepared by:	Gloria Bonilla										Phone No.:	415-286-0883	
52	HSA-CO Review Signature:											Date:	13-Sep-17	
53	HSA #1 (11/14/13)													

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Grantee's Name: Centro Latino de San Francisco, Inc.														Appendix B4, page 2	
2	Program Name: Congregate-ENP														Date: 9/13/2017	
3	cong- ENP 7/1/17 to 6/30/18															
4																
5																
6	<b>Salaries &amp; Benefits Detail</b>															
7																
8	<b>H.S.A-DAAS</b>	Agency Totals			For DAAS Nutrition		7/1/17 to 6/30/18			7/1/18 to 6/30/19			7/1/19 to 6/30/20			TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (a)	Adjusted Nutr FTE	Original Budgeted Salary	Modification	Revised Budgeted Salary	Original Budgeted Salary	Modification	Revised Budgeted Salary	Original Budgeted Salary	Modification	Revised Budgeted Salary	7/1/17 to 6/30/20	
10	Executive Director Bonilla, Gloria	\$74,298	100%	33%	33%	\$39,719	-\$15,275	\$24,444	\$39,719	-\$15,275	\$24,444	\$39,719	-\$15,275	\$24,444	\$	73,332
11	Nutritionist/Activities Facilitator Alvarez, Flor	\$34,320	100%	42%	42%	\$11,836	\$2,696	\$14,532	\$11,836	\$2,696	\$14,532	\$11,836	\$2,696	\$14,532	\$	43,596
12	Programs Comp. Coordinator Poveda, Olga	\$32,171	95%	26%	24%	\$4,521	\$3,276	\$7,797	\$4,521	\$3,276	\$7,797	\$4,521	\$3,276	\$7,797	\$	23,391
13	Accountant/HR Riano, Olivia	\$62,400	38%	24%	9%	\$5,516	\$0	\$5,516	\$5,516	\$0	\$5,516	\$5,516	\$0	\$5,516	\$	16,548
14	Accountant Asst./Bookkeeper TBH	\$32,171	80%	77%	62%	\$3,549	\$8,502	\$12,051	\$3,549	\$16,302	\$19,851	\$3,549	\$16,302	\$19,851	\$	51,753
15	Data Entry Clerk/ Scheduler Javier Barahona	\$32,171	22%	33%	7%	\$2,340	\$0	\$2,340	\$2,340	\$0	\$2,340	\$2,340	\$0	\$2,340	\$	7,020
16	Head Cook Crespin, Dora	\$45,760	100%	69%	69%	\$30,463	\$1,013	\$31,476	\$30,463	\$1,013	\$31,476	\$30,463	\$1,013	\$31,476	\$	94,428
17	Head Cook Asst. Cesar Uc Tzec	\$31,200	88%	60%	52%	\$16,369	\$0	\$16,369	\$16,369	\$0	\$16,369	\$16,369	\$0	\$16,369	\$	49,107
18	MNC Site Manager/Food Server Rodriguez, Ana	\$31,200	100%	66%	66%	\$20,465	\$0	\$20,465	\$20,465	\$0	\$20,465	\$20,465	\$0	\$20,465	\$	61,395
19	VC Site Manager/food prep worker Jannet Urquijo	\$31,200	75%	51%	39%	\$10,789	\$1,238	\$12,027	\$10,789	\$1,238	\$12,027	\$10,789	\$1,238	\$12,027	\$	36,081
20	MNC Data Entry Clerk Oscar Martinez	\$32,171	37%	58%	22%	\$6,975	\$0	\$6,975	\$6,975	\$0	\$6,975	\$6,975	\$0	\$6,975	\$	20,925
21	Los Mayores Site Mangr. & Asst. Instr. Omar Romero	\$31,200	100%	32%	32%	\$9,828	\$0	\$9,828	\$9,828	\$0	\$9,828	\$9,828	\$0	\$9,828	\$	29,484
22	Custodian Food/ Purchaser Javier Michel	\$31,417	48%	28%	14%	\$6,786	-\$2,496	\$4,290	\$6,786	-\$2,496	\$4,290	\$6,786	-\$2,496	\$4,290	\$	12,870
23	Janitor/Dishwasher Castaneda, Domingo	\$31,417	60%	65%	39%	\$12,215	\$0	\$12,215	\$12,215	\$0	\$12,215	\$12,215	\$0	\$12,215	\$	36,645
24	Social Worker I Rivera, Sylvia	\$38,220	100%	17%	17%	\$6,392	\$0	\$6,392	\$6,392	\$0	\$6,392	\$6,392	\$0	\$6,392	\$	19,176
25	Driver II HDM/Food Purchaser Olivar, Joaquin	\$34,320	6%	100%	6%	\$1,906	\$0	\$1,906	\$1,906	\$0	\$1,906	\$1,906	\$0	\$1,906	\$	5,718
26	ESL Citizenship Instructor/Coordinator Sarti, Maria	\$34,320	8%	100%	6%	\$2,182	\$0	\$2,182	\$2,182	\$0	\$2,182	\$2,182	\$0	\$2,182	\$	6,546
27	Driver I Rodriguez, Procorra	\$34,320	75%	21%	16%	\$4,290	\$1,072	\$5,362	\$4,290	\$1,072	\$5,362	\$4,290	\$1,072	\$5,362	\$	16,086
28	Social Services Asst. [Comm. S. & HDM] Ana Quiceno	\$34,320	7%	100%	7%	\$2,450	\$0	\$2,450	\$2,450	\$0	\$2,450	\$2,450	\$0	\$2,450	\$	7,349
29	Social Worker Asst/Act. Facilitator Acosta, Allie	\$34,320	9%	100%	9%	\$0	\$3,040	\$3,040	\$0	\$3,040	\$3,040	\$0	\$3,040	\$3,040	\$	9,120
30	Server VC-CL Maria Perez	\$31,200	37%	100%	37%	\$0	\$11,400	\$11,400	\$0	\$11,400	\$11,400	\$0	\$11,400	\$11,400	\$	34,200
31	Asst. Cook/Sat. /Food Server VC TBH	\$31,200	80%	100%	80%	\$0	\$18,240	\$18,240	\$0	\$24,960	\$24,960	\$0	\$24,960	\$24,960	\$	68,160
32	Site Manager MCCC TBH	\$33,280	50%	68%	34%	\$0	\$8,320	\$8,320	\$0	\$11,385	\$11,385	\$0	\$11,385	\$11,385	\$	31,090
33	Food Server/Janitor MCCC TBH	\$31,200	50%	68%	34%	\$0	\$7,800	\$7,800	\$0	\$10,674	\$10,674	\$0	\$10,674	\$10,674	\$	29,148
34	<b>TOTALS</b>	\$ 708,594				\$198,590	\$48,827	\$247,417	\$198,590	\$69,286	\$267,876	\$198,590	\$69,286	\$267,876	\$	783,168
35																
36	FRINGE BENEFIT RATE	17.00%														
37	EMPLOYEE FRINGE BENEFITS	\$ 120,461				\$25,815	\$16,246	\$42,061	\$25,815	\$19,724	\$45,539	\$25,815	\$19,724	\$45,539	\$	\$133,140
38																
39																
40	<b>TOTAL DAAS SALARIES &amp; BENEFITS</b>	\$ 829,055				\$224,405	\$65,074	\$289,478	\$224,405	\$89,011	\$313,416	\$224,405	\$89,011	\$313,416	\$	\$16,310
41																
42																
43	<b>Non - DAAS</b>	Agency Totals			For DAAS Meal											TOTAL
44	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Original Budgeted Salary	Modification	Revised Budgeted Salary	Original Budgeted Salary	Modification	Revised Budgeted Salary	Original Budgeted Salary	Modification	Revised Budgeted Salary	7/1/17 to 6/30/20	
45	Volunteer - Food Service Ipolito Bamaca	\$ 31,200	36%	79%	28%	\$8,759	\$0	\$8,759	\$8,759	\$0	\$8,759	\$8,759	\$0	\$8,759	\$	\$26,277
46	Volunteer- Food Service Ana Ruiz	\$ 31,200	12%	87%	10%	\$3,168	\$0	\$3,168	\$3,168	\$0	\$3,168	\$3,168	\$0	\$3,168	\$	\$9,504
47	Volunteer- Food Service Luz Dominguez	\$ 31,200	29%	80%	23%	\$7,286	\$0	\$7,286	\$7,286	\$0	\$7,286	\$7,286	\$0	\$7,286	\$	\$21,858
48	Food Service Runner Zolla Rodriguez	\$ 31,200	29%	80%	23%	\$7,286	\$0	\$7,286	\$7,286	\$0	\$7,286	\$7,286	\$0	\$7,286	\$	\$21,858
49	Volunteer - Food Service Maria Beltran	\$ 31,200	29%	80%	23%	\$7,286	\$0	\$7,286	\$7,286	\$0	\$7,286	\$7,286	\$0	\$7,286	\$	\$21,858
50															\$	\$0
51															\$	\$0
52															\$	\$0
53															\$	\$0
54	<b>TOTAL NON-DAAS</b>	\$ 156,000				\$33,785	\$0	\$33,785	\$33,785	\$0	\$33,785	\$33,785	\$0	\$33,785	\$	\$101,355
55																
56	FRINGE BENEFIT RATE															
57	EMPLOYEE FRINGE BENEFITS	\$				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	\$0
58																
59																
60	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 156,000				\$33,785	\$0	\$33,785	\$33,785	\$0	\$33,785	\$33,785	\$0	\$33,785	\$	\$101,355
61																
62	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 985,055				\$258,190	\$65,074	\$323,263	\$258,190	\$89,011	\$347,201	\$258,190	\$89,011	\$347,201	\$	\$1,017,665

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Grantee's Name: Centro Latino										Appendix B4, page 3			
2	Program Name: Congregate-ENP										Date: 9/13/2017			
3	cong- ENP 7/1/17 to 6/30/18													
4	<b>Operating Expense Detail</b>													
5	Expenditure Category	Term:	7/1/17 to 6/30/18			7/1/18 to 6/30/19			7/1/19 to 6/30/20			7/1/17 to 6/30/20		
6			Original	Modification	Revised	Original	Modification	Revised	Original	Modification	Revised	TOTAL		
7	H.S.A-DAAS	Annual #Meals Contracted:	48638	10661	59299	48638	16114	64752	48638	16114	64752	188803		
8	Rental of Property													
9	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$15,325	-\$2,735	\$12,590	\$15,325	-\$2,735	\$12,590	\$15,325	-\$2,735	\$12,590	\$37,770		
10	Office Supplies, Postage		\$628	\$425	\$1,053	\$628	\$425	\$1,053	\$628	\$425	\$1,053	\$3,159		
11	Building Improvements		\$1,997	-\$2	\$1,995	\$1,997	\$2,000	\$3,997	\$1,997	\$2,000	\$3,997	\$9,989		
12	Building Maintenance Supplies and Repair		\$3,412	\$868	\$4,280	\$3,412	\$868	\$4,280	\$3,412	\$868	\$4,280	\$12,840		
13	FOOD COSTS													
14	Raw Food	per meal \$ 0.82	\$38,910	\$9,715	\$48,625	\$38,910	\$14,186	\$53,096	\$38,910	\$14,186	\$53,096	\$154,818		
15	Cong Food Svc Supplie	per meal \$ 0.12	\$7,296	\$0	\$7,296	\$7,296	\$671	\$7,967	\$7,296	\$671	\$7,967	\$23,230		
16	HDM Food Svc Supplie	per meal												
17	Catered Meals	per meal												
18	CONSULTANT/SUBCONTRACTOR													
19	Consultant		\$3,250	\$0	\$3,250	\$3,250	\$0	\$3,250	\$3,250	\$0	\$3,250	\$9,750		
20														
21	OTHER COSTS:													
22	Payroll Services		\$1,331	\$0	\$1,331	\$1,331	\$300	\$1,631	\$1,331	\$300	\$1,631	\$4,593		
23	Accounting / Audit Fees		\$6,332	\$465	\$6,797	\$6,332	\$465	\$6,797	\$6,332	\$465	\$6,797	\$20,391		
24	Stipends		\$3,038	\$900	\$3,938	\$3,038	\$900	\$3,938	\$3,038	\$900	\$3,938	\$11,814		
25	Fuel		\$432	\$745	\$1,177	\$432	\$1,116	\$1,548	\$432	\$1,116	\$1,548	\$4,273		
26	Insurance(Liability)		\$5,359	\$0	\$5,359	\$5,359	\$1,000	\$6,359	\$5,359	\$1,000	\$6,359	\$18,077		
27	Insurance(Vehicle )		\$10,715	-\$4,126	\$6,589	\$10,715	-\$3,126	\$7,589	\$10,715	-\$3,126	\$7,589	\$21,767		
28	Vehicle Repairs		\$2,192	\$0	\$2,192	\$2,192	\$1,998	\$4,190	\$2,192	\$1,998	\$4,190	\$10,572		
29	Printing		\$2,251	\$532	\$2,783	\$2,251	\$530	\$2,781	\$2,251	\$530	\$2,781	\$8,345		
30	Staff Dev		\$946	\$0	\$946	\$946	\$1,000	\$1,946	\$946	\$1,000	\$1,946	\$4,838		
31	OTO ( new site MCCC)			\$33,000	\$33,000							\$33,000		
32	OTO ( new site Star Hotel)			\$3,750	\$3,750							\$3,750		
33	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$103,414</b>	<b>\$39,787</b>	<b>\$146,951</b>	<b>\$103,414</b>	<b>\$19,598</b>	<b>\$123,012</b>	<b>\$103,414</b>	<b>\$19,598</b>	<b>\$123,012</b>	<b>\$392,976</b>		
35	<b>Non-DAAS</b>													
36	Expenditure Category	Program										TOTAL		
37	Rental of Property													
38	Utilities(Elec, Water, Gas, Phone, Scavenger)													
39	Office Supplies, Postage													
40	Building Maintenance Supplies and Repair													
41	FOOD COSTS													
42	Raw Food	per meal \$ 0.74	\$35,904	\$7,870	\$43,774	\$35,904	\$11,895	\$47,799	\$35,904	\$11,895	\$47,799	\$139,373		
43	Cong Food Svc Supplie	per meal												
44	HDM Food Svc Supplie	per meal												
45	Catered Meals	per meal												
46	CONSULTANT/SUBCONTRACTOR Descriptive Title													
47	Registered Dietitian													
48														
49	OTHER COSTS:													
50	Facility Rental In-Kind		\$45,779	\$0	\$45,779	\$45,779	\$0	\$45,779	\$45,779	\$0	\$45,779	\$137,337		
51														
52														
53														
54														
55														
56														
57														
58	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$81,683</b>	<b>\$7,870</b>	<b>\$89,553</b>	<b>\$81,683</b>	<b>\$11,895</b>	<b>\$93,578</b>	<b>\$81,683</b>	<b>\$11,895</b>	<b>\$93,578</b>	<b>\$276,710</b>		
59														
60	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$185,098</b>	<b>\$51,406</b>	<b>\$236,504</b>	<b>\$185,098</b>	<b>\$31,493</b>	<b>\$216,591</b>	<b>\$185,098</b>	<b>\$31,493</b>	<b>\$216,591</b>	<b>\$669,685</b>		



**Appendix A-2 - Services to be Provided  
Glide Foundation  
Elderly Nutrition Program (ENP) Congregate Meals  
July 1, 2017 – June 30, 2020**

**I. Purpose**

The purpose of this grant is to assist older individuals and those identified by Grantee as its target population to live independently, by promoting better health through improved nutrition, and reduced isolation through accessible and appropriate meal services.

**II. Definitions**

Grantee	Glide Foundation
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
CRFC	California Retail Food Code establishes uniform health and sanitation standards for retail food facilities for regulation by the State Department of Public Health, and requires local health agencies to enforce these provisions.
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Aging and Adult Services
ENP	Elderly Nutrition Program (ENP), a program which provides nutrition services, as authorized by the Older Americans Act of 1965, as amended, and which shall be provided in accordance with Title 22 regulations.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans(DGA), published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide (a) A minimum of one-third of the Dietary Reference Intakes (DRI) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the grantee provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the grantee provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.
HACCP	Hazard Analysis of Critical Control Points. A prevention-

based food safety system focusing on time and temperature control at different crucial food service system points, monitoring and documenting practices and taking corrective actions when failure to meet critical limits is detected.

HSA	Human Services Agency of the City and County of San Francisco
Low-Income	At or below 100% of federal poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the Dietary Reference Intakes (DRI) for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, saturated fat, fiber, calcium, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, and vitamin B12.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Nutrition Counseling	Provision of individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status, performed by a Registered Dietitian in accordance with Sections 2585 and 2586, Business and Professions Code.

Nutrition Education	<p>Providing nutrition program consumers current facts and information which will promote improved food selection, eating habits, nutrition, health promotion, and disease prevention practices. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education plan and services shall be approved by a Registered Dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a RD. Nutrition education services shall be based on the needs of the consumers as determined by annual consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. The nutrition education activities shall be provided on quarterly basis and documented.</p>
Nutrition Screening	<p>The completion of a nutrition screening checklist by eligible consumers to determine if they are at nutrition risk. A nutrition screening checklist is a federal public information collection requirement in the National Aging Program Information System (NAPIS), found in the Federal Register, Volume 59, No. 188, September 29, 1994.</p>
OOA	Office on the Aging
Registered Dietitian (RD)	Registered Dietitian or Registered Dietitian Nutritionist:
Registered Dietitian Nutritionist (RDN)	<p>An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration. A Registered Dietitian (R.D.) shall be covered by professional liability insurance either individually (if a consultant) or through Grantee.</p>
SOGI	<p>Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)</p>
Title 22 Regulations	<p>Refers to Barclay’s official California Code of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program. <a href="http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/">http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/</a></p>

**III. Target Population**

The target population is residents of San Francisco County, age 60 and older. OOA targets individuals who have the greatest economic and social need such as living on low-income, are minorities, possessing non- or limited-English skills, or are lesbian/gay/bisexual/transgender.

**IV. Eligibility for Services**

To participate in Congregate Meal Program, an individual must meet either one of the following criteria:

- A senior, defined as an individual age 60 or older
- Spouse or domestic partner of a senior enrolled in the program
- An individual under the age of 60, with a disability who resides in housing facilities occupied primarily by older adults at which the congregate meal program is located
- A disabled individual who resides at home with and accompanies a senior who participates in the program. A volunteer under the age of 60 who helps in the meal program if doing so will not deprive a senior of a meal

**V. Services to be Provided**

A. Develop and maintain nutrition policies and procedures that are in compliance with and meet the nutrition and food service standards set forth by Title 22 Regulations, CDA, and OOA Policies to ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling consumers to reduce incidences of chronic diseases and maintain independent living.

- B. Provide congregate meal services, which include:
1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
  2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the ENP menu requirements.
  3. Provide at least one session per quarter of nutrition education to consumers. The total units of nutrition education will be, at minimum, as shown on the DAAS-OOA approved Site Chart. The service units will be reported in CA-GetCare in the month that the service is provided. One unit of nutrition education is defined as one nutrition presentation to one consumer.
  4. A nutrition screening using the “Determine Your Nutritional Health” checklist is conducted annually for each consumer and documented in CA-GetCare within one month of obtaining the consumer’s nutrition risk screening.
  5. The donation rate per meal requested of each consumer must be approved by the Grantee’s Board of Directors and in compliance with OOA policy memoranda.
  6. Service Units:

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	850	850	850	2,550
#Meals	53,686	53,686	53,686	161,058

- C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and

documented by a RD based on the number of monitoring approved in the Grantee's budget. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis and no later than once per quarter.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist as defined by OOA policy memoranda. The survey tool will be provided by OOA on an annual basis.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.

#### **VI. Service Objectives**

- A. Grantee will serve the total number of unduplicated consumers as indicated in Table A in Section V.
- B. Grantee will provide the total number of meals as indicated in Table A.
- C. Grantee will provide nutrition education to consumers in a group setting, a minimum of one nutrition education session per quarter at each site.
- D. Grantee will provide nutrition compliance units as indicated in Appendix B.

#### **VII. Outcome Objectives**

- A. At least 85% of consumers will report being satisfied with the meal quality as defined as "Excellent or Good" in the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee's average number of meals served at each congregate meal site.
- B. At least 75% of the consumers will report that the meal service helps maintain their independence based on the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee's average number of meals served at each congregate meal site.
- C. At least 65% of consumers will report an increase in the consumption of fruits and vegetables as evidenced by reported change from previous baseline data in the Nutrition Risk Screening Tool or other appropriate evaluation data.
- D. At least 65% of consumers with a high nutrition risk score as defined by the "Determine Your Nutritional Health" checklist will be connected to additional and appropriate resources.
- E. At least 65% of consumers that are identified as "lonely" as evidenced by the DAAS adopted loneliness screening tool will be connected to additional and appropriate resources.

## VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC, CDA nutrition service standards, and DAAS policies. This includes project income policies, nutrition education policies, consumer eligibility and targeted mandates, documentation for the units of service and all reporting, and progress of service and outcome objectives; how consumer records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, verification that hours of operation are reflected with in most recent approved site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA nutrition program standards.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

## IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare data obtained from consumers using the intake form for Congregate Meals, which includes the annual Nutrition Risk Screening, the loneliness screening, and the food security questions for all enrolled consumers by the due date as specified by OOA policy and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all consumer level service units in the Service Recording Tool and data for monthly service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives.
- D. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of meals served and number of nutrition compliance units provided.
- E. Grantee will enter the annual Outcome Objective metrics identified in Section VII of the appendix A in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 (or as amended) each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- G. Grantee will develop and maintain its OOA approved Site Chart. The site chart may be updated with the approval of OOA. A copy of the updated Site Chart will be kept in OOA's contractor program.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- I. Grantee will provide other reports as requested. Apart from the on-line reporting via CA-GetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract

Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas  
Contract Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120

Linda Lau, RD  
Lead Nutritionist/OOA  
1650 Mission Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103

	A	B	C	D	E	F	G	H
1	<b>BUDGET FORMS</b>							Appendix B-2, pg. 1
2								Document Date: 9/15/2017
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>							
4	<b>BUDGET PROPOSAL FORMS</b>							
5	Grantee's Name: Glide Foundation						Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>							
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20			
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)							Average cost/meal
9	<b>Annual #Meals Contracted</b>	Cong-ENP	Modification	REVISED	Cong-ENP	Cong-ENP	TOTAL	
10	Program Term	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>							
12	Salaries & Benefits	\$26,799	\$16,698	\$43,497	\$43,497	\$43,497	\$130,491	\$0.81
13	Operating Expense	\$92,948	\$28,032	\$120,980	\$120,980	\$120,980	\$362,940	\$2.25
14	<b>Subtotal</b>	\$119,747	\$44,730	\$164,477	\$164,477	\$164,477	\$493,431	\$3.06
15	Indirect Percentage (max 10%)	10%	10%	10%	10%	10%		
16	Indirect Cost (Line 15 X Line 14, check Gen. Guidance regarding indirect exclusion)	\$11,975	\$4,473	\$16,448	\$16,448	\$16,448	\$49,343	\$0.31
17	Capital Expenditure							
18	<b>TOTAL DAAS EXPENDITURES</b>	\$131,722	\$49,203	\$180,925	\$180,925	\$180,925	\$542,775	\$3.37
19								
20	<b>Non-DAAS Expenditures</b>							
21	Salaries & Benefits	\$88,942		\$88,942	\$88,942	\$88,942	\$266,826	\$1.66
22	Operating Expense	\$34,677	\$5,402	\$40,079	\$40,079	\$40,079	\$120,236	\$0.75
23	Capital Expenditure							
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	\$123,619	\$5,402	\$129,021	\$129,021	\$129,021	\$387,063	\$2.40
25								
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	\$255,341	\$54,605	\$309,946	\$309,946	\$309,946	\$929,837	\$5.77
27								
28	<b>HSA-DAAS Revenues</b>							
29	Meals	\$131,722	\$49,203	\$180,925	\$180,925	\$180,925	\$542,775	
30	Nutrition Compliance (if your agency is requesting funds)	\$5,550		\$5,550	\$5,550	\$5,550	\$16,650	
31								
32								
33								
34	<b>TOTAL HSA-DAAS REVENUES</b>	\$137,272	\$49,203	\$186,475	\$186,475	\$186,475	\$559,425	
35	PER MEAL COST, HSA-DAAS	\$3.37	\$3.37	\$3.37	\$3.37	\$3.37	\$3.37	
36	Per MEAL & COMPLIANCE COST	\$3.51	\$3.37	\$3.47	\$3.47	\$3.47	\$3.47	
37	<b>Non-DAAS Revenues</b>							
38	Project Income							
39	Agency Cash - Fundraising	\$70,781		\$70,781	\$70,781	\$70,781	\$212,343	\$1.32
40	Agency In-Kind Volunteer	\$58,240		\$58,240	\$58,240	\$58,240	\$174,720	\$1.08
41	Nutrition Compliance Revenues							
42								
43	<b>TOTAL NON HSA-DAAS REVENUES</b>	\$129,021		\$129,021	\$129,021	\$129,021	\$387,063	
44	PER MEAL COST, NON HSA-DAAS	\$3.30		\$2.40	\$2.40	\$2.40	\$2.40	
45	<b>TOTAL REVENUES</b>	\$266,293	\$49,203	\$315,496	\$315,496	\$315,496	\$946,488	
46	PER MEAL COST, TOTAL	\$6.81	\$3.37	\$5.88	\$5.88	\$5.88	\$5.88	
47	Full Time Equivalent (FTE)							
49	Prepared by: Dewey Singh				Phone No.:	Date: 9/15/17		
50	HSA-CO Review Signature:						Date:	
51	HSA #1	Form Rev. 12/22/16						
52	NOTE: Cells with formulas are protected to avoid accidental changes. To unprotect, go to Toolbar, "Review", select "Unprotect sheet". No password needed.							



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Grantee's Name: Glide Foundation												Appendix B-2, page 2	
2	Program Name:												Date: 9/15/2017	
3	Cong-ENP													
4														
5														
6	<b>Salaries &amp; Benefits Detail</b>												<b>TOTAL</b>	
7														
8	<b>H.S.A-DAAS</b>													
9		Agency Totals		For DAAS Nutrition		Modification		7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
10	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Modification	REVISED	Budgeted Salary	Budgeted Salary	TOTAL Budgeted Salary	
11	George Gundry - Director	\$130,000	100%	2%	2%	3%	3%	\$2,600	\$3,900	\$6,500	\$6,500	\$6,500	\$19,500	
12	Joselyn Barrera - Culinary Mana	\$65,000	100%	2%	2%	3%	3%	\$1,300	\$1,950	\$3,250	\$3,250	\$3,250	\$9,750	
13	Cho Wing Chung - Chef	\$36,110	100%	2%	2%	3%	3%	\$722	\$1,083	\$1,806	\$1,806	\$1,806	\$5,417	
14	James Sampagna - Shift Leade	\$43,682	100%	2%	2%	3%	3%	\$874	\$1,310	\$2,184	\$2,184	\$2,184	\$6,552	
15	Alexis Santiago - Shift Leader	\$35,153	100%	2%	2%	3%	3%	\$703	\$1,055	\$1,758	\$1,758	\$1,758	\$5,273	
16	Leon Thomas III - Steward	\$46,594	100%	2%	2%	3%	3%	\$932	\$1,398	\$2,330	\$2,330	\$2,330	\$6,989	
17	Dishwashers - 2	\$62,402	100%	9%	9%	1%	1%	\$5,616	\$505	\$6,122	\$6,122	\$6,122	\$18,365	
18	Program Navigator- TBA-2	\$80,000	100%	9%	9%	1%	1%	\$7,151	\$696	\$7,846	\$7,846	\$7,846	\$23,539	
19	Tina Huang-Program Assistant	\$43,702	100%	2%	2%	3%	3%	\$1,039	\$1,148	\$2,187	\$2,187	\$2,187	\$6,562	
20	TOTALS	\$ 542,643	900%	30%	30%	19%	19%	\$20,937	\$13,045	\$33,982	\$33,982	\$33,982	\$101,946	
21	FRINGE BENEFIT RATE	28.0%												
22	EMPLOYEE FRINGE BENEFITS	\$ 151,940						\$5,862	\$3,653	\$9,515	\$9,515	\$9,515	\$28,545	
23														
24														
25	TOTAL DAAS SALARIES & BENEFITS	\$ 694,583						\$26,799	\$16,698	\$43,497	\$43,497	\$43,497	\$130,491	
26														
27														
28	<b>Non - DAAS</b>													
29		Agency Totals		For DAAS Meal		For DAAS Meal							TOTAL	
30	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
31	Program Director	\$ 130,000	100%	2%	2.00%	2%	0.04%	\$2,600		\$2,600	\$2,600	\$2,600	\$7,800	
32	Data & Contracts Coordinator	\$ 52,896	100%	2%	2.00%	2%	0.04%	\$1,058		\$1,058	\$1,058	\$1,058	\$3,174	
33	Security Monitor	\$ 32,802	100%	5%	5.00%	5%	0.25%	\$1,640		\$1,640	\$1,640	\$1,640	\$4,920	
34	Meals Volunteers	\$ 29,120	1500%	13%	200.00%	13%	26.67%	\$58,240		\$58,240	\$58,240	\$58,240	\$174,720	
35	Assistant Manager	\$ 65,000	100%	2%	2.00%	2%	0.04%	\$1,300		\$1,300	\$1,300	\$1,300	\$3,900	
36	Senior Director of Programs	\$ 155,000	100%	2%	2.00%	2%	0.04%	\$3,100		\$3,100	\$3,100	\$3,100	\$9,300	
37	Senior Manager of Programs	\$ 77,400	100%	2%	2.00%	2%	0.04%	\$1,548		\$1,548	\$1,548	\$1,548	\$4,644	
38														
39														
40														
41														
42														
43														
44														
45														
46														
47	TOTAL NON-DAAS	\$ 542,218	2100%	28%	215%	28%	27%	\$69,486		\$69,486	\$69,486	\$69,486	\$208,458	
48														
49	FRINGE BENEFIT RATE	28.0%												
50	EMPLOYEE FRINGE BENEFITS	\$ 151,821						\$19,456		\$19,456	\$19,456	\$19,456	\$58,368	
51														
52														
53	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 694,039						\$88,942		\$88,942	\$88,942	\$88,942	\$266,826	
54														
55	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 1,388,622						\$115,741	\$16,698	\$132,439	\$132,439	\$132,439	\$397,317	
56	HSA #2	Form Rev. 12/22/16												

	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: Glide Foundator									Appendix B-2, page
2	Program Name:									Date: 9/15/2017
3	Cong-ENP									
4	<b>Operating Expense Detail</b>									
5										
7	H.S.A-DAAS	Annual #Meals Contracted:			39,086	14,600	53,686	53,686	53,686	TOTAL
8	Expenditure Category	Term:			7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20
9	Rental of Property									
10	Utilities(Elec, Water, Gas, Phone, Scavenger)									
11	Office Supplies, Postage									
12	Building Maintenance Supplies and Repair									
13	FOOD COSTS									
14	Raw Food	per meal \$ 1.79			\$69,964	\$26,134	\$96,098	\$96,098	\$96,098	\$288,294
15	Cong Food Svc Supplies	per meal \$ 0.13			\$5,081	\$1,898	\$6,979	\$6,979	\$6,979	\$20,938
16	HDM Food Svc Supplies	per meal \$ -								
17	Catered Meals	per meal \$ -								
18	CONSULTANT/SUBCONTRACTOR Descriptive Title									
19	Registered Dietitian				\$5,550		\$5,550	\$5,550	\$5,550	\$16,650
20										
21	OTHER COSTS:									
22	Insurance									
23	Staff Training & Travel									
24	Rental of Equipment									
25	Garbage				\$750		\$750	\$750	\$750	\$2,250
26	Information Technology				\$500		\$500	\$500	\$500	\$1,500
27	Repair/Maintenance				\$1,827		\$1,827	\$1,827	\$1,827	\$5,481
28	Food Storage				\$1,042		\$1,042	\$1,042	\$1,042	\$3,126
29	Occupancy				\$8,234		\$8,234	\$8,234	\$8,234	\$24,702
30	<b>TOTAL DAAS OPERATING EXPENSE</b>				<b>\$92,948</b>	<b>\$28,032</b>	<b>\$120,980</b>	<b>\$120,980</b>	<b>\$120,980</b>	<b>\$362,940</b>
32	<b>Non-DAAS</b>									<b>TOTAL</b>
33	Expenditure Category									
34	Rental of Property									
35	Utilities(Elec, Water, Gas, Phone, Scavenger)									
36	Office Supplies, Postage									
37	Building Maintenance Supplies and Repair									
38	FOOD COSTS									
39	Raw Food	per meal \$ 0.37			\$14,462	\$5,402	\$19,864	\$19,864	\$19,864	\$59,591
40	Cong Food Svc Supplies	per meal \$ -								
41	HDM Food Svc Supplies	per meal \$ -								
42	Catered Meals	per meal \$ -								
43	CONSULTANT/SUBCONTRACTOR Descriptive Title									
44	Registered Dietitian									
45										
46	OTHER COSTS:									
47	Insurance									
48	Staff Training & Travel									
49	Rental of Equipment									
50	Equipment				\$1,370		\$1,370	\$1,370	\$1,370	\$4,110
51	Garbage				\$1,200		\$1,200	\$1,200	\$1,200	\$3,600
52	Information Technology				\$2,000		\$2,000	\$2,000	\$2,000	\$6,000
53	Occupancy				\$15,645		\$15,645	\$15,645	\$15,645	\$46,935
54										
56	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>				<b>\$34,677</b>	<b>\$5,402</b>	<b>\$40,079</b>	<b>\$40,079</b>	<b>\$40,079</b>	<b>\$120,236</b>
57										
58	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>				<b>\$127,625</b>	<b>\$33,434</b>	<b>\$161,059</b>	<b>\$161,059</b>	<b>\$161,059</b>	<b>\$483,177</b>
63	HSA #3									

Form Rev. 12/22/16

**Appendix A-3- Services to be Provided  
Leah's Pantry**

**Citywide Nutrition Education and Counseling Services for  
Congregate and Home-Delivered Meals Programs  
July 1, 2017– June 30, 2020**

**I. Purpose**

The purpose of this contract is to provide nutrition education and counseling services to eligible consumers who are enrolled in DAAS funded congregate or home-delivered meal programs and who have been screened at "high nutrition risk" using the "Determine Your Nutritional Health" checklist developed by the Nutrition Screening Initiative

**II. Definitions**

Grantee	Leah's Pantry
AWD	Adults with Disabilities are adults age 18-59 with disability.
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Aging and Adult Services
Disability	<p>A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.</p> <p>Physical disability or mobile limitation includes wheelchair users, cane or walker users, limited reach ranges, limited hand movement, etc. Chronic illness includes HIV, lung disorders, heart disease/stroke, immune system disorders, diabetes, neurological disorders, etc. Sensory disability includes deaf, hard of hearing, blind, low vision, Aphasia, stuttering, etc. Mental disability includes psychiatric disabilities, depression, anxiety, obsessive-compulsive disorder, phobias, schizophrenia, bi-polar disorder, borderline personality disorder, etc. Cognitive disability includes Down's syndrome, traumatic brain injury, learning disabilities, etc.</p>

ENP	Elderly Nutrition Program (ENP), a program which provides nutrition services, as authorized by the Older Americans Act of 1965, as amended, and which shall be provided in accordance with Title 22 regulations.
Home-Delivered Meals (HDM)	Home-delivered meals are provided to consumers who are frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals.
HSA	Human Services Agency of the City and County of San Francisco
Low-Income	At or below 100% of federal poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Minority	<p>An ethnic person of color who is any of the following:</p> <p>a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.</p>
Nutrition Counseling	Provision of individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status, performed by a Registered Dietitian in accordance with Sections 2585 and 2586, Business and Professions Code.
Nutrition Education	Providing nutrition program consumers current facts and information which will promote improved food selection, eating habits, nutrition, health promotion, and disease prevention practices. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education plan and services shall be approved by a Registered Dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a RD. Nutrition education services shall be based on the needs of the consumers as determined by annual consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. The nutrition education activities shall be provided on quarterly basis and documented.
Nutrition Screening	The completion of a nutrition screening checklist by eligible consumers to determine if they are at nutrition risk. A nutrition screening checklist is a federal public information collection requirement in the National Aging Program Information System (NAPIS), found in the Federal Register, Volume 59, No. 188, September 29, 1994.
OOA	Office on the Aging
Registered Dietitian (RD)	Registered Dietitian or Registered Dietitian Nutritionist: An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration. A Registered

Registered Dietitian Nutritionist (RDN)	Dietitian (R.D.) shall be covered by professional liability insurance either individually (if a consultant) or through Grantee.
SOGI	Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )
Regulations	Refers to Barclay’s official California Code of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program. <a href="http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/">http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/</a>

**III. Target Population**

The target population is residents of San Francisco City and County, age 60 and older or adults with disabilities (age 18-59). OOA targets individuals who have been screened to be at high nutrition risk, have the greatest economic and social need such as living on low-income, are minorities, possessing non- or limited-English skills, or are lesbian/gay/bisexual/transgender.

**IV. Eligibility for Services**

To participate in the nutrition education or counseling services, an individual must be enrolled in either the DAAS-funded congregate or home-delivered meal and screened to be at high nutrition risk. Consumer referrals for this service will be from DAAS contracted agencies or DAAS Intake.

**V. Services to be Provided**

**A. Citywide Nutrition Counseling**

1. To provide individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status. To provide nutrition counseling to consumers screened and identified at high nutrition risk using the “Determine Your Nutritional Health” checklist. Counseling may also include referrals to other appropriate professional services or agencies. This service must be performed by a Registered Dietitian (R.D.) Consumers will be identified in CA-GetCare through a Citywide Nutrition Referral Dashboard. Grantee will report service units provided per DAAS-OOA policy and procedures.

One nutrition counseling unit = One consumer receiving counseling service  
 One nutrition counseling hour = One hour counseling provided

2. Annual Service Units:

Program	# of unduplicated consumers	Counseling Hours:	#Counseling Unit
Congregate	878	580	878
HDM	300	200	300
TOTAL	1,178	780	1,178

B. Citywide Nutrition Education/Group Classes

1. To provide nutrition education in a group setting. Nutrition education services shall be relevant and meet the needs of the consumers who are identified at high nutrition risks by the Determine Your Nutritional Health” checklist.
2. To provide nutrition education group classes to consumers who are referred by OOA nutrition contractors. Classes can be held at the Grantee’s meal sites, other OOA contractor or community partner sites that are easily accessible to consumers. Classes shall be conducted with at least 12 consumers signing up. Documentation of the group class and attendance shall be documented and reported in CAGetCare.

One nutrition class = 45-60 minutes presentation

One nutrition education unit = One consumer receiving one nutrition class

3. Annual Service Units:

Congregate Program	# of unduplicated consumers *	# of classes	# of Partner sites
In-Person Presentations	608	243	40
# Training/Presentations for Online Class	150	44	30

Note: \* Based on number of classes x Average #unduplicated consumer per class

- C. Grantee will ensure the nutrition education provided is culturally appropriate for the consumers registered and will be provided by Registered Dietitian. Translation is required if the majority of the consumer’s registered for the class is monolingual in a language other than English.
- D. Grantee will attend the quarterly in-service training coordinated and provided by the OOA and share the relevant information with nutrition agency’s staff and volunteers.
- E. Grantee will have a signed Agreement to collaborate with the designated nutrition agencies to clarify the expectations and responsibilities between the parties involved and share a copy with DAAS-OOA.
- F. Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. See Appendix F and Exhibit E.
- G. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.  
<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

IV. Service Objectives

On an annual basis:

- A. Grantee will provide the nutrition services as indicated in Section V.
- B. Grantee will provide nutrition service units as indicated in Appendix B.

## V. Outcome Objectives

- A. At least 65% of consumers who received nutrition education and/or counseling services from Grantee will report an increase in the consumption of fruits and vegetables as evidenced by reported change from previous baseline data in the Nutrition Risk Screening Tool or other appropriate evaluation data.
- B. At least 75% of consumers that have attended nutrition education classes or received nutrition counseling will report that the services received has been beneficial in improving their nutrition status, overall health, or in maintaining their independence.

## VI. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of, the nutrition education material and/or curriculum provided to consumers, back up documentation for the units of service and all reporting, and progress of service and outcome objectives.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

## VII. Reporting Requirements

- A. Grantee will submit appropriate documentation of the nutrition services in CaGetCare according to OOA policies and procedures.
- B. Grantee will provide a quarterly report of number of services provided as described in Section IV – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of nutrition compliance units provided.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- D. Grantee will provide other reports as requested.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- F. Apart from the on-line reporting via CaGetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Drake Herrador  
Contract Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120  
[Drake.Herrador@sfgov.org](mailto:Drake.Herrador@sfgov.org)

Linda Lau  
Lead Nutritionist/OOA  
1650 Mission Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103  
[Linda.Lau@sfgov.org](mailto:Linda.Lau@sfgov.org)

Leah's Pantry

Nutrition Compliance/Quality Assurance

Services:

Proposed Service Units:

Cost Per Service Unit:

	Year 1	Total Year 1	HSA-DAAS	Non-H.S.A	Year 2	Total Year 2	HSA-DAAS	Non-H.S.A	Year 3	Total Year 3	HSA-DAAS	Non-H.S.A
	# of units				# of units/ sessions				# of units/ sessions			
<b>Nutrition Education:</b> Annual #SESSION (or presentation) a year or # Times a year handouts will be delivered to seniors in HDW	162.0		\$ 217		162.0		\$ 217		162.0		\$ 217	
Cost per HOUR Nutri. Ed	243.0		\$ 145		243.0		\$ 145		243.0		\$ 145	
<b>Nutrition Counseling:</b> Annual #hours to be provided	580.0		\$ 56		592.0		\$ 56		592.0		\$ 56	
Annual #sessions to be provided	878.2		\$ 37		896.0		\$ 37		896.0		\$ 37	
<b>HACCP Kitchen Monitoring</b> (1 unit = 1 session completed)												
<b>Site/Route Monitoring</b> (1 unit = 1 session completed):												
<b>Menu Planning &amp; Analysis</b> (1 unit = 1 set menu completed)												
<b>HDM Assessment</b> (1 unit = annual intake assessment & reassessment completed)												
<b>OTHER Nutrition Compliance:</b> In-service training to staff/volunteers (1 unit =1 hour)	44	\$ 6,338	\$ 145.03		48	\$ 6,925	\$ 145.00		48	\$ 6,925	\$ 145.00	
Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)	38.0	\$ 2,394	\$ 63.00		18.0	\$ 1,134	\$ 63.00		18.0	\$ 1,134	\$ 63.00	

NOTES:

Cells with formulas are protected to avoid accidental changes. To unprotect, go to "Review" then "Unprotect sheet". No password needed.  
Enter service units for THE year, as appropriate & if required for your program.

Budget Narrative:

Staff travel includes both parking & mileage reimbursements at .545 per mile, average trip 7 miles  
Printing and reproduction costs are budgeted at .07 per copy for presentations and counseling  
Food costs are budgeted for \$25 per presentation (162 presentations)  
Printing and reproduction costs are budgeted at \$50 per staff training sessions (30 sessions)  
Each session nutrition education = 90 minutes



**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

Contractor Name: \_\_\_\_\_

Leath's Pantry

(Check One) New  Renewal  Modification  X

If modification, Effective Date of Mod. \_\_\_\_\_ No. of Mod. \_\_\_\_\_

Program: Nutrition Compliance for ENP- Congregate

Budget Reference Page No.(s)	Current	Modification	REVENUE Cost Allocation:		Current	Modification	REVENUE Cost Allocation:		Current	Modification	REVENUE Cost Allocation:		Total Revenue
			Non-DAAS	Revised			Non-DAAS	Revised			Non-DAAS	Revised	
<b>Program Term</b>	7/1/17-6/30/18	7/1/17-6/30/18			7/1/18-6/30/19	7/1/18-6/30/19			7/1/19-6/30/20	7/1/19-6/30/20			
<b>Expenditures</b>													
Nutrition Education													
Salaries & Benefits	\$24,749	\$0		\$24,749	\$24,749	\$0		\$24,749	\$24,749	\$0		\$24,749	\$74,247
Operating Expense	\$5,841	\$0		\$5,841	\$5,841	\$0		\$5,841	\$5,841	\$0		\$5,841	\$17,523
Subtotal Direct	\$30,590	\$0		\$30,590	\$30,590	\$0		\$30,590	\$30,590	\$0		\$30,590	\$91,770
Indirect Percentage	15.0%	15.0%		\$15	15.0%	15.0%		\$4,588	15.0%	15.0%		\$4,588	15%
Indirect Expense	\$4,588	\$0		\$4,588	\$4,588	\$0		\$4,588	\$4,588	\$0		\$4,588	\$13,765
<b>Total Nutrition Education</b>	<b>\$35,178</b>			<b>\$35,178</b>	<b>\$35,178</b>			<b>\$35,178</b>	<b>\$35,178</b>			<b>\$35,178</b>	<b>\$105,535</b>
Nutrition Counseling													
Salaries & Benefits	\$9,364	\$18,222		\$27,586	\$9,364	\$18,807		\$28,172	\$9,364	\$18,807		\$28,172	\$83,929
Operating Expense	\$331	\$338		\$669	\$331	\$338		\$669	\$331	\$338		\$669	\$2,007
Subtotal Direct	\$9,695	\$18,560		\$28,255	\$9,695	\$19,145		\$28,841	\$9,695	\$19,145		\$28,841	\$85,936
Indirect Percentage	15.0%	15.0%		15.0%	15.0%	15.0%		15.0%	15.0%	15.0%		15.0%	15.0%
Indirect Expense	\$1,454	\$2,784		\$4,238	\$1,454	\$2,871		\$4,326	\$1,454	\$2,871		\$4,326	\$12,890
<b>Total Nutrition Counseling</b>	<b>\$11,150</b>	<b>\$21,344</b>		<b>\$32,493</b>	<b>\$11,150</b>	<b>\$22,016</b>		<b>\$33,167</b>	<b>\$11,150</b>	<b>\$22,016</b>		<b>\$33,167</b>	<b>\$98,827</b>
Other Nutrition Compliance													
Salaries & Benefits	\$4,042	\$1,937		\$5,979	\$4,042	\$1,351		\$5,394	\$4,042	\$1,351		\$5,394	\$16,766
Operating Expense	\$1,614	\$0		\$1,614	\$1,614.00	\$0		\$1,614	\$1,614	\$0		\$1,614	\$4,842
Subtotal Direct	\$5,657	\$1,937		\$7,593	\$5,656	\$1,351		\$7,008	\$5,656	\$1,351		\$7,008	\$21,609
Indirect Percentage	15.0%	15.0%		15.0%	15.0%	15.0%		15.0%	15.0%	15.0%		15.0%	15%
Indirect Expense	\$849	\$290		\$1,139	\$849	\$203		\$1,051	\$849	\$203		\$1,051	\$3,241
<b>Total Other Nutrition Compliance</b>	<b>\$6,505</b>	<b>\$2,227</b>		<b>\$8,732</b>	<b>\$6,506</b>	<b>\$1,554</b>		<b>\$8,059</b>	<b>\$6,505.69</b>	<b>\$1,553.94</b>		<b>\$8,059</b>	<b>\$24,850</b>
<b>GRAND Total Expenditures</b>	<b>\$32,833</b>	<b>\$23,572</b>		<b>\$76,404</b>	<b>\$52,834</b>	<b>\$23,570</b>		<b>\$76,404</b>	<b>\$52,834</b>	<b>\$23,570</b>		<b>\$76,404</b>	<b>\$229,212</b>
<b>HSA Revenues</b>													
<b>TOTAL HSA REVENUES</b>													
Other Non-H.S.A.-DAAS Revenues													
<b>TOTAL OTHER REVENUES</b>													
Full Time Equivalent (FTE)													

Prepared by: Adrienne Markworth

Telephone No.:

9/15/17

HSA-CO Review Signature: \_\_\_\_\_

HSA #1

NOTES:

9/15/17

Leah's Pantry  
 Program: Nutrition Compliance for ENP- Congregate  
 (Same as Line 9 on HSA #1)

Nutrition Education Salaries & Benefits Detail

TERM	7/1/17-6/30/18		7/1/18-6/30/19		7/1/19-6/30/20		7/1/17 to 6/30/20				
	Agency Totals	For HSA Program	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	For HSA Program	Total			
POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	H.S.A.-DAAS
Sr. Program Coordinator	\$54,080	100%	16%	16%	\$8,653	\$8,653		\$8,653	\$8,653		\$25,958
Registered Dietician	\$58,240	25%	30%	8%	\$4,368	\$4,368		\$4,368	\$4,368		\$13,104
Nutrition Educator	\$50,000	100%	12%	12%	\$6,000	\$6,000		\$6,000	\$6,000		\$18,000
Administrator	\$50,000	100%	5%	5%	\$2,500	\$2,500		\$2,500	\$2,500		\$7,500
TOTALS	\$212,320	325%	63%	41%	\$21,521	\$21,521		\$21,521	\$21,521		\$64,562
FRINGE BENEFIT RATE	15%										
EMPLOYEE FRINGE BENEFITS	\$31,848				\$3,228	\$3,228		\$3,228	\$3,228		\$9,684
TOTAL SALARIES & BENEFITS	\$244,168				\$24,749	\$24,749		\$24,749	\$24,749		\$74,247
TOTAL SALARIES & BENEFITS for H.S.A Program x3yrs	\$74,247										\$91,517

Leah's Pantry  
 Program: Nutrition Compliance for ENP- Congregate  
 (Same as Line 9 on HSA #1)

Nutrition Education Operating Expense Detail

TERM:	Year 1		Year 2		Year 3		TOTAL REVENUE 7/1/17 to 6/30/20
	7/1/17-6/30/18	REVENUE Cost Allocation:	7/1/18-6/30/19	REVENUE Cost Allocation:	7/1/19-6/30/20	REVENUE Cost Allocation:	
Expenditure Category							
Rental of Property							
Utilities(Elec, Water, Gas, Phone, Scavenger)							
Office Supplies, Postage							
Building Maintenance Supplies and Repair							
Printing and Reproduction	\$1,134	H.S.A.-DAAS	\$1,134	H.S.A.-DAAS	\$1,134	H.S.A.-DAAS	\$3,402
Insurance		Non-HSA-DAAS		Non-HSA-DAAS		Non-HSA-DAAS	
Staff Training							
Staff Travel	\$657		\$657		\$657		\$1,971
Small Equipment (under \$5,000/item)							
Rental of Equipment							
SUBCONTRACTORS Descriptive Title							
OTHER							
Food for recipe demos	\$4,050	\$4,050	\$4,050	\$4,050	\$4,050	\$4,050	\$12,150
TOTAL OPERATING EXPENSE	\$5,841	\$5,841	\$5,841	\$5,841	\$5,841	\$5,841	\$17,523
TOTAL OPERATING EXPENSE x3Yrs	\$17,523						
HSA #3							9/15/17

Nutrition Counseling Salaries & Benefits Detail

TERM	7/1/17-6/30/18		7/1/17-6/30/18		7/1/17-6/30/18		7/1/18-6/30/19		7/1/18-6/30/19		7/1/18-6/30/19		7/1/19-6/30/20		7/1/19-6/30/20		7/1/17 to 6/30/20	
	Agency Totals	For HSA Program	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	For HSA Program	REVENUE Cost Allocation	Total Revenue			
POSITION TITLE	Annual Full Time Salary Y for FTE	Total % FTE	% FTE	Adjusted FTE	Current	Modification	Non-DAAS	Revised DAAS	Current	Modification	Non-DAAS	Revised DAAS	Current	Modification	Non-DAAS	Revised DAAS	Total Revenue	
Registered Dietitian (s)	\$68,000	60%	47%	28.20%	\$6,656	\$12,520		\$19,176	\$6,656	\$12,520		\$19,176	\$6,656	\$12,520		\$19,176	\$57,528	
Program Coordinator	\$54,080	100%	10%	10%	\$1,487	\$3,325		\$4,812	\$1,487	\$3,834		\$5,321	\$1,487	\$3,834		\$5,321	\$15,454	
TOTALS	\$122,080	160%	57%	38%	\$8,143	\$15,845		\$23,988	\$8,143	\$16,354		\$24,497	\$8,143	\$16,354		\$24,497	\$72,982	
FRINGE BENEFIT RATE	15%																	
EMPLOYEE FRINGE BENEFIT	\$18,312				\$1,221	\$2,377		\$3,598	\$1,221	\$2,453		\$3,675	\$1,221	\$2,453		\$3,675	\$10,947	
TOTAL SALARIES & BENEFIT	\$140,392				\$9,364	\$18,222		\$27,586	\$9,364	\$18,807		\$28,172	\$9,364	\$18,807		\$28,172	\$83,929	
HSA #4																		9/15/17

TERM

Nutrition Counseling Operating Expense Detail

Expenditure Category	7/1/17- 6/30/18	7/1/17- 6/30/18	7/1/17- 6/30/18	7/1/18- 6/30/19	7/1/18- 6/30/19	7/1/18- 6/30/19	7/1/19- 6/30/20	7/1/19- 6/30/20	7/1/19- 6/30/20	7/1/17- 6/30/20
	Current	Modification	NON- DAAS	Current	Modification	NON- DAAS	Current	Modification	NON- DAAS	Total Revenue
Rental of Property										
Utilities(Elec, Water, Gas, Phone, Scavenger)										
Office Supplies, Postage										
Building Maintenance Supplies and Repair										
Printing and Reproduction	\$250	(\$73)		\$250	(\$73)		\$250	(\$73)		\$531
Insurance										
Staff Training										
Staff Travel	\$81	\$411		\$81	\$411		\$81	\$411		\$492
Small Equipment (under \$5,000/item)										
Rental of Equipment										
SUBCONTRACTORS Descriptive Title										
OTHER										
TOTAL OPERATING EXPENSE	\$331	\$338		\$331	\$338		\$331	\$338		\$2,007
TOTAL OPERATING EXPENSE X3yrs	\$993									
HSA #5										9/15/17

Other Nutrition Compliance Salaries & Benefits Detail

TERM	POSITION TITLE	Agency Totals Annual Full Timesalar	Total % FTE	% FTE	Adjusted FTE	For HSA Program Current H.S.A.- DAAS	REVENUE Cost Allocation Modification Non-HSA- DAAS	Revised DAAS	For HSA Program Current H.S.A.- DAAS	REVENUE Cost Allocation Modification Non- HSA- DAAS	Revised DAAS	For HSA Program Current H.S.A.- DAAS	REVENUE Cost Allocation Modification Non- HSA- DAAS	Revised DAAS	Total Revenue
	Sr. Program Coordinator	\$54,080	100%	6%	6%	\$3,515	\$1,684	\$5,199	\$3,515	\$1,175	\$4,690	\$3,515	\$1,175	\$4,690	\$14,579
	TOTALS	\$54,080	100%	6%	6%	\$3,515	\$1,684	\$5,199	\$3,515	\$1,175	\$4,690	\$3,515	\$1,175	\$4,690	\$14,579
	FRINGE BENEFIT RATE	15%													
	EMPLOYEE FRINGE BENEFITS	\$8,112				\$527.25	\$252.60	\$780	\$527.25	\$176.25	\$704	\$527	\$176	\$704	\$2,187
	TOTAL SALARIES & BENEFITS	\$62,192				\$4,042.25	\$1,936.60	\$5,979	\$4,042.25	\$1,351.25	\$5,394	\$4,042	\$1,351	\$5,394	\$16,766
	TOTAL SALARIES & BENEFITS for H.S.A Program x3yrs	\$12,127													
	HSA #14														9/15/17

Leah's Pantry  
 Program: Nutrition Compliance for ENP- Congregate  
 (Same as Line 9 on HSA #1)

Other Nutrition Compliance Operating Expense Detail

TERM	Year 1 7/1/17- 6/30/18	REVENUE Cost Allocation:		Year 2 7/1/18- 6/30/19	REVENUE Cost Allocation:		Year 3 7/1/19- 6/30/20	REVENUE Cost Allocation:		TOTAL REVENUE 7/1/17 to 6/30/20
		Current H.S.A.- DAAS	Non-HSA- DAAS		Current H.S.A.- DAAS	Non-HSA- DAAS		Current H.S.A.- DAAS	Non-HSA- DAAS	
Expenditure Category										
Rental of Property										
Utilities(Elec, Water, Gas, Phone, Scavenger)										
Office Supplies, Postage										
Building Maintenance Supplies and Repair										
Printing and Reproduction	\$1,500	\$1,500		\$1,500	\$1,500		\$1,500	\$1,500	\$4,500	
Insurance										
Staff Training										
Staff Travel	\$114	\$114		\$114	\$114		\$114	\$114	\$342	
Small Equipment (over \$500 but under \$5,000/item)										
Rental of Equipment										
SUBCONTRACTORS Descriptive Title										
OTHER										
TOTAL OPERATING EXPENSE	\$1,614	\$1,614		\$1,614	\$1,614		\$1,614	\$1,614	\$4,842	
TOTAL OPERATING EXPENSE x3yrs	\$4,842									
HSA #15										

**Appendix A-5 - Services to be Provided  
Project Open Hand**

**Citywide Nutrition Education and Counseling Services for  
Congregate and Home-Delivered Meals Programs  
July 1, 2017– June 30, 2020**

**I. Purpose**

The purpose of this contract is to provide nutrition education and counseling services to eligible consumers who are enrolled in DAAS funded congregate or home-delivered meal programs and who have been screened at “high nutrition risk” using the “Determine Your Nutritional Health” checklist developed by the Nutrition Screening Initiative

**II. Definitions**

Grantee	Project Open Hand
AWD	Adults with Disabilities are adults age 18-59 with disability.
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Aging and Adult Services
Disability	<p>A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.</p> <p>Physical disability or mobile limitation includes wheelchair users, cane or walker users, limited reach ranges, limited hand movement, etc. Chronic illness includes HIV, lung disorders, heart disease/stroke, immune system disorders, diabetes, neurological disorders, etc. Sensory disability includes deaf, hard of hearing, blind, low vision, Aphasia, stuttering, etc. Mental disability includes psychiatric disabilities, depression, anxiety, obsessive-compulsive disorder, phobias, schizophrenia, bi-polar disorder, borderline personality disorder, etc. Cognitive disability includes Down’s syndrome, traumatic brain injury, learning disabilities, etc.</p>



ENP	Elderly Nutrition Program (ENP), a program which provides nutrition services, as authorized by the Older Americans Act of 1965, as amended, and which shall be provided in accordance with Title 22 regulations.
Home-Delivered Meals (HDM)	Home-delivered meals are provided to consumers who are frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals.
HSA	Human Services Agency of the City and County of San Francisco
Low-Income	At or below 100% of federal poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following:  a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Nutrition Counseling	Provision of individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status, performed by a Registered Dietitian in accordance with Sections 2585 and 2586, Business and Professions Code.
Nutrition Education	Providing nutrition program consumers current facts and information which will promote improved food selection, eating habits, nutrition, health promotion, and disease prevention practices. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education plan and services shall be approved by a Registered Dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a RD. Nutrition education services shall be based on the needs of the consumers as determined by annual consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. The nutrition education activities shall be provided on quarterly basis and documented.
Nutrition Screening	The completion of a nutrition screening checklist by eligible consumers to determine if they are at nutrition risk. A nutrition screening checklist is a federal public information collection requirement in the National Aging Program Information System (NAPIS), found in the Federal Register, Volume 59, No. 188, September 29, 1994.
OOA	Office on the Aging
Registered Dietitian (RD)	Registered Dietitian or Registered Dietitian Nutritionist: An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration. A Registered

Registered Dietitian Nutritionist (RDN)	Dietitian (R.D.) shall be covered by professional liability insurance either individually (if a consultant) or through Grantee.
SOGI	Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )
Regulations	Refers to Barclay’s official California Code of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program. <a href="http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/">http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/</a>

**III. Target Population**

The target population is residents of San Francisco City and County, age 60 and older or adults with disabilities (age 18-59). OOA targets individuals who have been screened to be at high nutrition risk, have the greatest economic and social need such as living on low-income, are minorities, possessing non- or limited-English skills, or are lesbian/gay/bisexual/transgender.

**IV. Eligibility for Services**

To participate in the nutrition education or counseling services, an individual must be enrolled in either the DAAS-funded congregate or home-delivered meal and screened to be at high nutrition risk. Consumer referrals for this service will be from DAAS contracted agencies or DAAS Intake.

**V. Services to be Provided**

Grantee will provide nutrition compliance units as indicated in Appendix B.

**A. Citywide Nutrition Counseling**

1. To provide individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status. To provide nutrition counseling to consumers screened and identified at high nutrition risk using the “Determine Your Nutritional Health” checklist. Counseling may also include referrals to other appropriate professional services or agencies. This service must be performed by a Registered Dietitian (R.D.) Consumers will be identified in CA-GetCare through a Citywide Nutrition Referral Dashboard. Grantee will report service units provided per DAAS-OOA policy and procedures.

One nutrition counseling unit = One consumer receiving counseling service  
 One nutrition counseling hour = One hour counseling provided

2. Annual Service Units:  
FY 2017-18

Program	# of unduplicated consumers	Counseling Hours:	#Counseling Unit
Congregate	716	608	730
HDM	359	305	366
TOTAL	1075	913	1096

FY 2018-19 and FY 2019-20

Program	# of unduplicated consumers	Counseling Hours:	#Counseling Unit
Congregate	727	618	742
HDM	359	305	366
TOTAL	1086	923	1108

B. Citywide Nutrition Education/Group Classes

1. To provide nutrition education in a group setting. Nutrition education services shall be relevant and meet the needs of the consumers who are identified at high nutrition risks by the Determine Your Nutritional Health” checklist.
2. To provide nutrition education group classes to consumers who are referred by OOA nutrition contractors. Classes can be held at the Grantee’s meal sites, other OOA contractor or community partner sites that are easily accessible to consumers. Classes shall be conducted with at least 12 consumers signing up. Documentation of the group class and attendance shall be documented and reported in CA-GetCare.

One nutrition class = 45-60 minutes presentation

One nutrition education unit = One consumer receiving one nutrition class

3. Annual Service Units:

Congregate Program	# of unduplicated consumers *	# of classes	# of Partner sites
In-Person Presentations	780	52	20

Note: \* Based on number of classes x Average #unduplicated consumer per class

- C. Grantee will ensure the nutrition education provided is culturally appropriate for the consumers registered and will be provided by Registered Dietitian. Translation is required if the majority of the consumer’s registered for the class is monolingual in a language other than English.
- D. Grantee will attend the quarterly in-service training coordinated and provided by the OOA and share the relevant information with nutrition agency’s staff and volunteers.
- E. Grantee will have a signed Agreement to collaborate with the designated nutrition agencies to clarify the expectations and responsibilities between the parties involved and share a copy with DAAS-OOA.

- F. Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. See Appendix F and Exhibit E.
- G. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.

**IV. Service Objectives**

On an annual basis:

- A. Grantee will provide the nutrition services as indicated in Section V.
- B. Grantee will provide nutrition service units as indicated in Appendix B.

**V. Outcome Objectives**

- A. At least 65% of consumers who received nutrition education and/or counseling services from Grantee will report an increase in the consumption of fruits and vegetables as evidenced by reported change from previous baseline data in the Nutrition Risk Screening Tool or other appropriate evaluation data.
- B. At least 75% of consumers that have attended nutrition education classes or received nutrition counseling will report that the services received have been beneficial in improving their nutrition status, overall health, or in maintaining their independence.

**VI. Monitoring Activities**

- A. Nutrition Program Monitoring: Program monitoring will include review of, the nutrition education material and/or curriculum provided to consumers, back up documentation for the units of service and all reporting, and progress of service and outcome objectives.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**VII. Reporting Requirements**

- A. Grantee will submit appropriate documentation of the nutrition services in CA-GetCare according to OOA policies and procedures.
- B. Grantee will provide a quarterly report of number of services provided as described in Section IV – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of nutrition compliance units provided.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- D. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- E. Grantee will provide other reports as requested.

- F. Apart from the on-line reporting via CA-GetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas  
Contract Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120

Sarah Chan, RD  
Nutritionist/OOA  
1650 Mission Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103

**Nutrition Compliance/Quality Assurance Services:**

**Cost Per Service Unit:**

**Proposed Service Units:**

	Year 1 # of units/ sessions	Total Year 1	HSA-DAAS	Non-H.S.A	Year 2 # of units/ sessions	Total Year 2	HSA-DAAS	Non-H.S.A	Year 3 # of units/ sessions	Total Year 3	HSA-DAAS	Non-H.S.A
<b>Nutrition Education:</b>												
Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM	52	\$ 85	\$ 85	\$ -	52	\$ 85	\$ 85	\$ -	52	\$ 85	\$ 85	\$ -
<b>Nutrition Counseling:</b>												
Annual #hours to be provided	608	\$ 60	\$ 60	\$ -	618	\$ 60	\$ 60	\$ -	618	\$ 60	\$ 60	\$ -
Annual #sessions to be provided	730	\$ 50	\$ 50	\$ -	742	\$ 50	\$ 50	\$ -	742	\$ 50	\$ 50	\$ -
<b>HACCP Kitchen Monitoring</b> (1 unit = 1 session completed)												
<b>Site/Route Monitoring</b> (1 unit = 1 session completed):												
<b>Menu Planning &amp; Analysis</b> (1 unit = 1 set menu completed)												
<b>HDM Assessment</b> (1 unit = annual intake assessment & reassessment completed)												
<b>OTHER Nutrition Compliance:</b>												
In-service training to staff/volunteers (1 unit = 1 hour)	30	\$ 60	\$ 60	\$ -	20	\$ 60	\$ 60	\$ -	20	\$ 60	\$ 60	\$ -
Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)	30	\$ 60	\$ 60	\$ -	20	\$ 60	\$ 60	\$ -	20	\$ 60	\$ 60	\$ -

**NOTES:**

Cells with formulas are protected to avoid accidental changes. To unprotect, go to "Review" then "Unprotect sheet". No password needed. Enter service units for THE year, as appropriate & if required for your program.

**Budget Narrative:**

HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM

Term  
July 1, 2017 to June 30, 2020

Line #	Description	Year 1			Year 2			Year 3			Total Revenue 7/1/17 to 6/30/20
		7/1/17-6/30/18	H.S.A.-DAAS	Non-HSA-DAAS	7/1/18-6/30/19	H.S.A.-DAAS	Non-HSA-DAAS	7/1/19-6/30/20	H.S.A.-DAAS	Non-HSA-DAAS	
9	Program: Nutrition Education and Counseling - Cong										
10	Budget Reference Page No.(s)										
11	Program Term	7/1/17-6/30/18			7/1/18-6/30/19			7/1/19-6/30/20			
12	Expenditures										
13	Nutrition Education										
14	Salaries & Benefits	\$4,401	\$4,401		\$4,401	\$4,401		\$4,401	\$4,401		\$13,202
15	Operating Expense	\$4,401	\$4,401		\$4,401	\$4,401		\$4,401	\$4,401		\$13,202
16	Subtotal Direct	\$4,401	\$4,401		\$4,401	\$4,401		\$4,401	\$4,401		\$13,202
17	Indirect Percentage										
18	Indirect Expense										
19	Total Nutrition Education	\$4,401	\$4,401		\$4,401	\$4,401		\$4,401	\$4,401		\$13,202
20	Nutrition Counseling										
21	Salaries & Benefits	\$18,316	\$18,316		\$18,316	\$18,316		\$18,316	\$18,316		\$84,948
22	Operating Expense	\$8,200	\$8,200		\$8,200	\$8,800		\$8,800	\$9,800		\$25,800
23	Subtotal Direct	\$18,316	\$18,316		\$18,316	\$18,800		\$18,316	\$18,800		\$110,748
24	Indirect Percentage										
25	Indirect Expense										
26	Total Nutrition Counseling	\$18,316	\$18,316		\$18,316	\$18,800		\$18,316	\$18,800		\$110,748
27	HACCOP Kitchen Monitoring										
28	Salaries & Benefits										
29	Operating Expense										
30	Subtotal Direct										
31	Indirect Percentage										
32	Indirect Expense										
33	Total HACCOP Kitchen Monitoring										
34	Salaries & Benefits										
35	Operating Expense										
36	Subtotal Direct										
37	Indirect Percentage										
38	Indirect Expense										
39	Total Site/Route Monitoring										
40	Menu Planning										
41	Salaries & Benefits										
42	Operating Expense										
43	Subtotal Direct										
44	Indirect Percentage										
45	Indirect Expense										
46	Total Menu Planning										
47	HDM Assessments										
48	Salaries & Benefits										
49	Operating Expense										
50	Subtotal Direct										
51	Indirect Percentage										
52	Indirect Expense										
53	Total HDM Assessments										
54	Other Nutrition Compliance										
55	Salaries & Benefits	\$1,800	\$1,800		\$1,200	\$1,200		\$1,200	\$1,200		\$4,200
56	Operating Expense	\$1,800	\$1,800		\$1,200	\$1,200		\$1,200	\$1,200		\$4,200
57	Subtotal Direct	\$1,800	\$1,800		\$1,200	\$1,200		\$1,200	\$1,200		\$4,200
58	Indirect Percentage										
59	Indirect Expense										
60	Total Other Nutrition Compliance	\$1,800	\$1,800		\$1,200	\$1,200		\$1,200	\$1,200		\$4,200
61	Grand Total Expenditures	\$22,717	\$22,717		\$22,717	\$22,717		\$22,717	\$22,717		\$128,151
62	Grand Total Expenditures	\$22,717	\$22,717		\$22,717	\$22,717		\$22,717	\$22,717		\$128,151
63	HSA Revenues										
72	Full Time Equivalent (FTE)										
74	Prepared by: Dawn Raffaeili										
75	HSA-CO Review Signature:										
76	HSA #1										

Telephone No.: 415-447-2481  
Date: 8/14/17  
Document Date: 9/13/17

Nutrition Education Salaries & Benefits Detail

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
2	Program: Nutrition Education and Counseling - Cong	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	For HSA Program Budgeted Salary	REVENUE Cost Allocation	Non-HSA-DAAS	For HSA Program Budgeted Salary	REVENUE Cost Allocation	Non-HSA-DAAS	For HSA Program Budgeted Salary	REVENUE Cost Allocation	Non-HSA-DAAS	Total Revenue
3	(Same as Line 9 on HSA #1)														
4															
5															
6															
7	TERM:														
8	July 1, 2017 to June 30, 2020														
9															
10															
11		Agency Totals				For HSA Program			For HSA Program						
12	POSITION TITLE														
13	Registered Dietician	\$62,400	100%	5%	5%	\$3,143	\$3,143		\$3,143	\$3,143		\$3,143	\$3,143		\$9,430
14															
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29															
30	TOTALS	\$62,400	100%	5%	5%	\$3,143	\$3,143		\$3,143	\$3,143		\$3,143	\$3,143		\$9,430
31	FRINGE BENEFIT RATE														
32		40%													
33	EMPLOYEE FRINGE BENEFITS	\$24,960				\$1,257	\$1,257		\$1,257	\$1,257		\$1,257	\$1,257		\$3,772
34															
35															
36	TOTAL SALARIES & BENEFITS	\$87,360				\$4,401	\$4,401		\$4,401	\$4,401		\$4,401	\$4,401		\$13,202
37	TOTAL SALARIES & BENEFITS for H.S.A Program x3yrs	\$13,202													
38	HSA #2														





Nutrition Counseling Operating Expense Detail

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	
1																																		
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Document Date: 9/13/17



**APPENDIX A4 - SERVICES TO BE PROVIDED**  
**Centro Latino de San Francisco**

**Congregate Meals for Adults with Disabilities (AWD)**  
**Effective July 1, 2017 – June 30, 2020**

**I. PURPOSE**

The purpose of this grant is to assist adults with disabilities living in San Francisco and identified by Grantee as its target population to live independently, by promoting better health through improved nutrition, and reduced isolation through accessible and appropriate meal services.

**II. DEFINITIONS**

Grantee	Centro Latino de San Francisco
AWD	Adults with Disabilities are adults age 18-59 with disability.
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CRFC	California Retail Food Code establishes uniform health and sanitation standards for retail food facilities for regulation by the State Department of Public Health, and requires local health agencies to enforce these provisions.
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Aging and Adult Services
Disability	<p>A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.</p> <p>Physical disability or mobile limitation includes wheelchair users, cane or walker users, limited reach ranges, limited hand movement, etc. Chronic illness includes HIV, lung disorders, heart disease/stroke, immune system disorders, diabetes, neurological disorders, etc. Sensory disability includes deaf, hard of hearing, blind, low vision, Aphasia, stuttering, etc. Mental disability includes psychiatric disabilities, depression, anxiety, obsessive-compulsive disorder, phobias, schizophrenia, bi-polar disorder, borderline personality disorder, etc. Cognitive disability includes Down's syndrome, traumatic brain injury, learning disabilities, etc.</p>

HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points, monitoring and documenting practices and taking corrective actions when failure to meet critical limits is detected.
HSA	Human Services Agency of the City and County of San Francisco
Low-Income	At or below 200% of federal poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the Dietary Reference Intakes (DRI) for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, saturated fat, fiber, calcium, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, and vitamin B12.
Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans(DGA), published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide (a) A minimum of one-third of the DRIs as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the grantee provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the grantee provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Nutrition Counseling	Provision of individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status, performed by a Registered Dietitian in accordance with Sections 2585 and 2586, Business and Professions Code.

Nutrition Education	Providing nutrition program consumers current facts and information which will promote improved food selection, eating habits, nutrition, health promotion, and disease prevention practices. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education plan and services shall be approved by a Registered Dietitian.. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a RD. Nutrition educations services shall be based on the needs of the consumers as determined by annual consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. The nutrition education activities shall be provided on quarterly basis and documented.
Nutrition Screening	The completion of a nutrition screening checklist by eligible consumers to determine if they are at nutrition risk. A nutrition screening checklist is a federal public information collection requirement in the National Aging Program Information System (NAPIS), found in the Federal Register, Volume 59, No. 188, September 29, 1994.
Registered Dietitian (RD)	Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration.
SOGI	Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )

**III. Target Population**

The target population is residents of San Francisco County, between the age of 18 and 59 who have a disability as defined in Section II, Definitions. OOA targets individuals who have the greatest economic and social need such as living on low-income, are minorities, possessing non- or limited-English skills, or are lesbian/gay/bisexual/transgender.

**IV. Eligibility for Services**

To participate in an AWD Congregate Meal Program, the consumer must be between the age of 18 and 59 and have a disability as defined in Section II, Definitions.

**V. Services to be Provided**

- A. Develop and maintain nutrition policies and procedures that are in compliance with and meet the nutrition and food service standards set forth by the most recent California Retail Food Code and OOA Policy to ensure the provision of quality meals and sound nutrition information enabling consumers to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
  - 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.

2. Provide the total number of AWD meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the AWD menu requirements.
3. Provide at least one session per quarter of nutrition education to consumers. The total units of nutrition education will be, at minimum, as shown on the DAAS-OOA approved Site Chart. The service units will be reported in the month that the service is provided.
4. A nutrition screening using the “Determine Your Health” checklist is conducted annually for each consumer and documented in CA-GetCare within one month of obtaining the consumer’s nutrition risk screening.
5. The donation rate per meal requested of each consumer must be approved by the Grantee’s Board of Directors and in compliance with OOA policy memoranda.

6. Service Units:

Table A	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	196	196	196	588
#Meals	11,705	11,705	11,705	35,114

- C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented by a RD based on the number of monitoring approved in the Grantee’s budget. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis and no later than once per quarter.
- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA’s nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist as defined by OOA policy memoranda. The survey tool will be provided by OOA on an annual basis.
- G. The Grantee will comply with the City’s food service waste reduction ordinance (File #06094), and use reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.

## **VI. Service Objectives**

- A. Grantee will serve the total number of unduplicated consumers as indicated in Table A, in Section V.
- B. Grantee will provide the total number of meals as indicated in Table A, in Section V.
- C. Grantee will provide nutrition education to consumers in a group setting, a minimum of one nutrition education session per quarter

## **VII. Outcome Objectives**

- A. At least 85% of consumers will report being satisfied with the meal quality as defined as “Excellent or Good” in the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee’s average number of meals served at each congregate meal site.
- B. At least 75% of the consumers will report that the meal service helps maintain their independence based on the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee’s average number of meals served at each congregate meal site.
- C. At least 65% of consumers will report an increase in the consumption of fruits and vegetables as evidenced by a reported change from previous baseline data in the Nutrition Risk Screening Tool or other appropriate evaluation data.
- D. At least 65% of consumers with a high nutrition risk score as defined by the “Determine Your Nutritional Health” checklist will be connected to additional and appropriate resources.
- E. At least 65% of consumers that are identified as” lonely” as evidenced by the DAAS adopted loneliness screening tool will be connected to additional and appropriate resources.

## **VIII. Monitoring Activities**

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC, CDA nutrition service standards, and DAAS policies. This includes project income policies, nutrition education policies, consumer eligibility and targeted mandates, documentation for the units of service and all reporting, and progress of service and outcome objectives; how consumer records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, verification that hours of operation are reflected with in most recent approved site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA nutrition program standards. .
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.



## IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare data obtained from consumers using the congregate program intake form, which includes the annual Nutrition Risk Screening, the loneliness screening, and the food security questions for all enrolled consumers by the due date as specified by OOA policy and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all consumer level service units in the Service Recording Tool and data for monthly service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives.
- D. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of meals served and number of nutrition compliance units provided.
- E. Grantee will enter the annual Outcome Objective metrics identified in Section VII of this Appendix A in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements
- G. Grantee will develop and maintain its OOA approved Site Chart. The site chart may be updated with the approval of OOA. A copy of the updated Site Chart will be kept in OOA's contractor program.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- I. Grantee will provide other reports as requested. Apart from the on-line reporting via CaGetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact

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	A	B	C	D	E	F	G	H	I	J	K	L
1	BUDGET FORMS											Appendix B5, pg. 1
2												Document Date 9/12/2017
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>											
4	<b>BUDGET SUMMARY</b>											
5	Grantee's Name: Centro Latino de San Francisco, Inc.											Grant Term
6	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/> X											
7	Effective Date of Mod: 7/1/17 No. of Mod: Cong- AWD											7/1/17 to 6/30/20
8	Program: CONGREGATE-AWD	Original	Addback	Revised	Original	Addback	Revised	Original	Addback	Revised	TOTAL	Average cost/meal
9	Annual #Meals Contracted	5,633	6,072	11,705	5,633	6,072	11,705	5,633	6,072	11,705	35,115	
10	Program Term	7/1/17 to 6/30/18			7/1/18 to 6/30/19			7/1/19 to 6/30/20			7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>											
12	Salaries & Benefits	\$32,435	\$35,822	\$68,257	\$32,435	\$35,822	\$68,257	\$32,435	\$35,822	\$68,257	\$204,771	\$5.83
13	Operating Expense	5078	\$4,618	\$9,696	5078	\$4,618	\$9,696	5078	\$4,618	\$9,696	\$29,088	\$0.83
14	Subtotal	\$37,513	\$40,440	\$77,953	\$37,513	\$40,440	\$77,953	\$37,513	\$40,440	\$77,953	\$233,859	\$6.66
15	Indirect Percentage (max 10%)											
16	Indirect Cost (Line 14 X Line 13)											
17	OTO											
18	TOTAL DAAS EXPENDITURES	\$37,513	\$40,440	\$77,953	\$37,513	\$40,440	\$77,953	\$37,513	\$40,440	\$77,953	\$233,859	\$6.66
19												
20	<b>Non-DAAS Expenditures</b>											
21	Salaries & Benefits	\$6,052	\$0	\$6,052	\$6,052	\$0	\$6,052	\$6,052	\$0	\$6,052	\$18,156	\$0.52
22	Operating Expense	\$8,595	\$3,829	\$12,424	\$8,595	\$3,829	\$12,424	\$8,595	\$3,829	\$12,424	\$37,272	\$1.06
23	Capital Expenditure											
24	TOTAL Non-DAAS EXPENDITURES	\$14,647	\$3,829	\$18,476	\$14,647	\$3,829	\$18,476	\$14,647	\$3,829	\$18,476	\$55,428	\$1.58
25												
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$52,160	\$44,269	\$96,429	\$52,160	\$44,269	\$96,429	\$52,160	\$44,269	\$96,429	\$289,287	\$8.24
27												
28	<b>HSA-DAAS Revenues</b>											
29	Meals	\$37,513	\$40,440	\$77,953	\$37,513	\$40,440	\$77,953	\$37,513	\$40,440	\$77,953	\$233,859	
30												
31												
32												
33												
34	TOTAL HSA-DAAS REVENUES	\$37,513	\$40,440	\$77,953	\$37,513	\$40,440	\$77,953	\$37,513	\$40,440	\$77,953	\$233,859	
35	PER MEAL COST, HSA-DAAS	\$6.66		\$6.66	\$6.66		\$6.66	\$6.66		\$6.66	\$6.66	
36	<b>Non-DAAS Revenues</b>											
37	Project Income	3,552	\$3,829	7,381	3,552	\$3,829	7,381	3,552	\$3,829	7,381	\$22,143	\$0.63
38	Agency Cash - Facility rental	\$5,043	\$0	\$5,043	\$5,043	\$0	\$5,043	\$5,043	\$0	\$5,043	\$15,129	\$0.43
39	Agency In-Kind Volunteer	\$6,052	\$0	\$6,052	\$6,052	\$0	\$6,052	\$6,052	\$0	\$6,052	\$18,156	\$0.52
40												
41												
42	TOTAL NON HSA-DAAS REVENUES	\$14,647	\$3,829	\$18,476	\$14,647	\$3,829	\$18,476	\$14,647	\$3,829	\$18,476	\$55,428	
43	PER MEAL COST, NON HSA-DAAS			\$1.58			\$1.58			\$1.58	\$1.58	
44	TOTAL REVENUES	\$52,160	\$44,269	\$96,429	\$52,160	\$44,269	\$96,429	\$52,160	\$44,269	\$96,429	\$289,287	
45	PER MEAL COST, TOTAL			\$8.24							\$8.24	
46	Full Time Equivalent (FTE)											
48	Prepared by: Gloria Bonilla											Phone No.: 415-286-0883
49	HSA-CO Review Signature: _____											Date: 9/12/2017
50	HSA #1 (11/14/13)											

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	Grantee's Name: Centro Latino de San Francisco, Inc.															Appendix B5, page 2	
2	Program Name: Cong. - AWD															Date: 9/12/17	
3	Cong. - AWD																
4																	
5																	
6																	
7	<b>Salaries &amp; Benefits Detail</b>																
8	<b>H.S.A-DAAS</b>	Agency Totals			For DAAS Nutrition			7/1/17 to 6/30/18			7/1/18 to 6/30/19			7/1/19 to 6/30/20			7/1/17 to 6/30/20
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Original	Addback	Revised	Original	Addback	Revised	Original	Addback	Revised	TOTAL		
10	Executive Director Bonilla, Gloria	\$74,298	100%	11%	11%	\$8,501	\$0	\$8,501	\$8,501	\$0	\$8,501	\$8,501	\$0	\$8,501	\$25,504		
11	Nutritionist/Activities Facilitator: Alvarez, Flor	\$34,320	100%	16%	16%	\$3,827	\$1,794	\$5,621	\$3,827	\$1,794	\$5,621	\$3,827	\$1,794	\$5,621	\$16,862		
12	Programs Comp. Coordinator Poveda, Olga	\$32,171	100%	7%	7%	\$2,392	\$0	\$2,392	\$2,392	\$0	\$2,392	\$2,392	\$0	\$2,392	\$7,175		
13	Accountant/HR Riano, Olivia	\$62,400	38%	22%	3%	\$1,931	\$0	\$1,931	\$1,931	\$0	\$1,931	\$1,931	\$0	\$1,931	\$5,792		
14	Head Cook Crespin, Dora	\$45,760	100%	10%	10%	\$2,620	\$2,033	\$4,654	\$2,620	\$2,033	\$4,654	\$2,620	\$2,033	\$4,654	\$13,981		
15	Asst Head Cook Cesar Uc Tzec	\$31,200	88%	4%	3%	\$998	\$0	\$998	\$998	\$0	\$998	\$998	\$0	\$998	\$2,995		
16	MNC Site Manager/Food Server - Ana Rodriguez	\$31,200	100%	4%	4%	\$1,147	\$0	\$1,147	\$1,147	\$0	\$1,147	\$1,147	\$0	\$1,147	\$3,441		
17	VC Site Manager/food prep worker Jannet Urquijo	\$31,200	75%	20%	15%	\$721	\$3,900	\$4,621	\$721	\$3,900	\$4,621	\$721	\$3,900	\$4,621	\$13,864		
18	Data Entry Clerk Oscar Martinez	\$32,171	38%	10%	4%	\$1,267	\$0	\$1,267	\$1,267	\$0	\$1,267	\$1,267	\$0	\$1,267	\$3,800		
19	Los Mayores Site Mangr. & Asst. Instr. - Omar Romero	\$31,200	100%	6%	6%	\$1,908	\$0	\$1,908	\$1,908	\$0	\$1,908	\$1,908	\$0	\$1,908	\$5,723		
20	Janitor/Dishwasher Castaneda, Domingo	\$31,417	60%	5%	3%	\$996	\$0	\$996	\$996	\$0	\$996	\$996	\$0	\$996	\$2,987		
21	Social Worker I Rivera, Sylvia	\$38,220	100%	3%	3%	\$1,161	\$0	\$1,161	\$1,161	\$0	\$1,161	\$1,161	\$0	\$1,161	\$3,482		
22	Social Services Asst. (Comm. S. & HDM) Ana Quiceno	\$34,320	38%	10%	4%	\$1,236	\$0	\$1,236	\$1,236	\$0	\$1,236	\$1,236	\$0	\$1,236	\$3,707		
23	Server (TBH) - Star Hotel	\$31,200	31%	31%	10%	\$ -	\$9,750	\$9,750	\$ -	\$9,750	\$9,750	\$ -	\$9,750	\$9,750	\$29,250		
24	Driver, Procoro Ramirez	\$34,320	50%	13%	6%	\$ -	\$2,145	\$2,145	\$ -	\$2,145	\$2,145	\$ -	\$2,145	\$2,145	\$6,435		
25	Site Manager (TBH) - Star Hotel	\$33,280	50%	63%	32%	\$ -	\$10,516	\$10,516	\$ -	\$10,516	\$10,516	\$ -	\$10,516	\$10,516	\$31,549		
26																	
27	<b>TOTALS</b>	<b>\$ 608,676</b>				<b>\$28,705</b>	<b>\$30,139</b>	<b>\$58,842</b>	<b>\$28,705</b>	<b>\$30,139</b>	<b>\$58,842</b>	<b>\$28,705</b>	<b>\$30,139</b>	<b>\$58,842</b>	<b>\$176,527</b>		
28																	
29	FRINGE BENEFIT RATE	16.00%															
30	EMPLOYEE FRINGE BENEFITS	\$ 97,388				\$3,730	\$5,685	\$9,415	\$3,730	\$5,685	\$9,415	\$3,730	\$5,685	\$9,415	\$28,244		
31																	
32	<b>TOTAL DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 706,064</b>				<b>\$32,435</b>	<b>\$35,922</b>	<b>\$68,257</b>	<b>\$32,435</b>	<b>\$35,822</b>	<b>\$68,257</b>	<b>\$32,435</b>	<b>\$35,822</b>	<b>\$68,257</b>	<b>\$204,771</b>		
33																	
34																	
35																	
36	<b>Non - DAAS</b>	Agency Totals			For DAAS Meal									TOTAL			
37	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Original	Addback	Revised	Original	Addback	Revised	Original	Addback	Revised	7/1/17 to 6/30/18		
38	Volunteer Ipolito Bamaca	\$ 31,200	36%	2%	1%	\$190	\$0	\$190	\$190	\$0	\$190	\$190	\$0	\$190	\$570		
39	Volunteer Maria Hernandez	\$ 31,200	49%	26%	13%	\$3,960	\$0	\$3,960	\$3,960	\$0	\$3,960	\$3,960	\$0	\$3,960	\$11,880		
40	Volunteer Luz Dominguez	\$ 31,200	29%	7%	2%	\$634	\$0	\$634	\$634	\$0	\$634	\$634	\$0	\$634	\$1,902		
41	Volunteer Sylvia Lopez	\$ 31,200	29%	7%	2%	\$634	\$0	\$634	\$634	\$0	\$634	\$634	\$0	\$634	\$1,902		
42	Volunteer Maria Beltran	\$ 31,200	29%	7%	2%	\$634	\$0	\$634	\$634	\$0	\$634	\$634	\$0	\$634	\$1,902		
43																	
44																	
45	<b>TOTAL NON-DAAS</b>	<b>\$ 156,000</b>				<b>\$6,052</b>	<b>\$0</b>	<b>\$6,052</b>	<b>\$6,052</b>	<b>\$0</b>	<b>\$6,052</b>	<b>\$6,052</b>	<b>\$0</b>	<b>\$6,052</b>	<b>\$18,156</b>		
46																	
47	FRINGE BENEFIT RATE																
48	EMPLOYEE FRINGE BENEFITS	\$ -				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
49																	
50	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 156,000</b>				<b>\$6,052</b>	<b>\$0</b>	<b>\$6,052</b>	<b>\$6,052</b>	<b>\$0</b>	<b>\$6,052</b>	<b>\$6,052</b>	<b>\$0</b>	<b>\$6,052</b>	<b>\$18,156</b>		
51																	
52	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 862,064</b>				<b>\$38,487</b>	<b>\$35,822</b>	<b>\$74,309</b>	<b>\$38,487</b>	<b>\$35,822</b>	<b>\$74,309</b>	<b>\$38,487</b>	<b>\$35,822</b>	<b>\$74,309</b>	<b>\$222,927</b>		
53																	

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	Grantee's Name: Centro Centro Latir								Appendix B5, page 3						
2	Program Name: Congr. AWD								Date: 9/12/17		Date: 9/12/17				
3	Cong- AWD														
4	<b>Operating Expense Detail</b>														
5															
6															
7	H.S.A-DAAS	Annual #Meals Contracted:		Original	Addback	Revised	Original	Addback	Revised	Original	Addback	Revised		TOTAL	
8	Expenditure Category	Term:		5,633	6,072	11,705	5,633	6,072	11,705	5,633	6,072	11,705			
9	Rental of Property														
10	Utilities(Elec. Water, Gas, Phone, Scavenger)														
11	Office Supplies, Postage														
12	Building Improvements														
13	Building Maintenance Supplies and Repair														
14	FOOD COSTS														
15	Raw Food	per meal \$ 0.81		\$4,990	\$4,522	\$9,512	\$4,990	\$4,522	\$9,512	\$4,990	\$4,522	\$9,512		\$28,536	
16	Cong Food Svc Supplies	per meal \$ 0.02		\$88	\$95	\$184	\$88	\$95	\$184	\$88	\$95	\$184		\$551	
17	HDM Food Svc Supplies	per meal													
18	Catered Meals	per meal													
19	CONSULTANT/SUBCONTRACTOR Descriptive Title														
20	Registered Dietitian														
21															
22	OTHER COSTS:														
23	Accounting and Auditing														
24	Other Expenses														
25	Stipends														
26	Insurance (liability)														
27	Vehicle Costs														
28	Staff Development														
29	Printing & Copying														
30															
31															
32	TOTAL DAAS OPERATING EXPENSE			\$5,078	\$4,618	\$9,696	\$5,078	\$4,618	\$9,696	\$5,078	\$4,618	\$9,696		\$29,088	
34	Non-DAAS													TOTAL	
35	Expenditure Category														
36	Rental of Property														
37	Utilities(Elec. Water, Gas, Phone, Scavenger)														
38	Office Supplies, Postage														
39	Building Maintenance Supplies and Repair														
40	FOOD COSTS														
41	Raw Food	per meal \$ 0.63		\$3,552	\$3,829	\$7,381	\$3,552	\$3,329	\$7,381	\$3,552	\$3,829	\$7,381		\$22,143	
42	Cong Food Svc Supplies	per meal													
43	HDM Food Svc Supplies	per meal													
44	Catered Meals	per meal													
45	CONSULTANT/SUBCONTRACTOR Descriptive Title														
46	Registered Dietitian														
47															
48	OTHER COSTS:														
49	Facility Rental (In-Kind)			\$5,043	\$0	\$5,043	\$5,043	\$0	\$5,043	\$5,043	\$0	\$5,043		\$15,129	
50															
51															
52															
53															
54															
55															
56	TOTAL Non-DAAS OPERATING EXPENSE			\$8,595	\$3,829	\$12,424	\$8,595	\$3,829	\$12,424	\$8,595	\$3,829	\$12,424		\$37,272	
57															
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE			\$13,673	\$8,446	\$22,120	\$13,673	\$8,446	\$22,120	\$13,673	\$8,446	\$22,120		\$66,360	

**Appendix A-6 - Services to be Provided  
Project Open Hand**

**Congregate Meals for Adults with Disabilities (AWD)  
July 1, 2017 – June 30, 2020**

**I. Purpose**

The purpose of this grant is to assist adults with disabilities living in San Francisco and identified by Grantee as its target population to live independently, by promoting better health through improved nutrition, and reduced isolation through accessible and appropriate meal services.

**II. Definitions**

Grantee	Project Open Hand
AWD	Adults with Disabilities are adults age 18-59 with disability.
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CRFC	California Retail Food Code establishes uniform health and sanitation standards for retail food facilities for regulation by the State Department of Public Health, and requires local health agencies to enforce these provisions.
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Aging and Adult Services
Disability	<p>A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.</p> <p>Physical disability or mobile limitation includes wheelchair users, cane or walker users, limited reach ranges, limited hand movement, etc. Chronic illness includes HIV, lung disorders, heart disease/stroke, immune system disorders, diabetes, neurological disorders, etc. Sensory disability includes deaf, hard of hearing, blind, low vision, Aphasia, stuttering, etc. Mental disability includes psychiatric disabilities, depression, anxiety, obsessive-compulsive disorder, phobias, schizophrenia, bi-polar disorder, borderline personality disorder, etc. Cognitive disability includes Down's syndrome, traumatic brain injury, learning disabilities, etc.</p>

HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points, monitoring and documenting practices and taking corrective actions when failure to meet critical limits is detected.
HSA	Human Services Agency of the City and County of San Francisco
Low-Income	At or below 200% of federal poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the Dietary Reference Intakes (DRI) for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, saturated fat, fiber, calcium, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, and vitamin B12.
Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans(DGA), published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide (a) A minimum of one-third of the DRIs as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the grantee provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the grantee provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Nutrition Counseling	Provision of individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses, about options and methods for improving their nutritional status, performed by a Registered Dietitian in accordance with Sections 2585 and 2586, Business and Professions Code.

Nutrition Education	Providing nutrition program consumers current facts and information which will promote improved food selection, eating habits, nutrition, health promotion, and disease prevention practices. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education plan and services shall be approved by a Registered Dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a RD. Nutrition education services shall be based on the needs of the consumers as determined by annual consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. The nutrition education activities shall be provided on quarterly basis and documented.
Nutrition Screening	The completion of a nutrition screening checklist by eligible consumers to determine if they are at nutrition risk. A nutrition screening checklist is a federal public information collection requirement in the National Aging Program Information System (NAPIS), found in the Federal Register, Volume 59, No. 188, September 29, 1994.
Registered Dietitian (RD)	Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration.
SOGI	Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )

**III. Target Population**

The target population is residents of San Francisco County, between the age of 18 and 59 who have a disability as defined in Section II, Definitions. OOA targets individuals who have the greatest economic and social need such as living on low-income, are minorities, possessing non- or limited-English skills, or are lesbian/gay/bisexual/transgender.

**IV. Eligibility for Services**

To participate in an AWD Congregate Meal Program, the consumer must be between the age of 18 and 59 and have a disability as defined in Section II, Definitions.

**V. Services to be Provided**

- A. Develop and maintain nutrition policies and procedures that are in compliance with and meet the nutrition and food service standards set forth by the most recent California Retail Food Code and OOA Policy to ensure the provision of quality meals and sound nutrition information enabling consumers to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
  - 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.

2. Provide the total number of AWD meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the AWD menu requirements.
3. Provide at least one session per quarter of nutrition education to consumers. The total units of nutrition education will be, at minimum, as shown on the DAAS-OOA approved Site Chart. The service units will be reported in the month that the service is provided.
4. A nutrition screening using the “Determine Your Health” checklist is conducted annually for each consumer and documented in CA-GetCare within one month of obtaining the consumer’s nutrition risk screening.
5. The donation rate per meal requested of each consumer must be approved by the Grantee’s Board of Directors and in compliance with OOA policy memoranda.
6. Service Units:

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	480	480	480	1,440
#Meals	34,838	34,838	34,838	104,514

- C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented by a RD based on the number of monitoring approved in the Grantee’s budget. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis and no later than once per quarter.
- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA’s nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist as defined by OOA policy memoranda. The survey tool will be provided by OOA on an annual basis.
- G. The Grantee will comply with the City’s food service waste reduction ordinance (File #06094), and use reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.



## **VI. Service Objectives**

- A. Grantee will serve the total number of unduplicated consumers as indicated in Table A, in Section V.
- B. Grantee will provide the total number of meals as indicated in Table A, in Section V.
- C. Grantee will provide nutrition education to consumers in a group setting, a minimum of one nutrition education session per quarter

## **VII. Outcome Objectives**

- A. At least 85% of consumers will report being satisfied with the meal quality as defined as “Excellent or Good” in the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee’s average number of meals served at each congregate meal site.
- B. At least 75% of the consumers will report that the meal service helps maintain their independence based on the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee’s average number of meals served at each congregate meal site.
- C. At least 65% of consumers will report an increase in the consumption of fruits and vegetables as evidenced by a reported change from previous baseline data in the Nutrition Risk Screening Tool or other appropriate evaluation data.
- D. At least 65% of consumers with a high nutrition risk score as defined by the “Determine Your Nutritional Health” checklist will be connected to additional and appropriate resources.
- E. At least 65% of consumers that are identified as “lonely” as evidenced by the DAAS adopted loneliness screening tool will be connected to additional and appropriate resources.

## **VIII. Monitoring Activities**

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC, CDA nutrition service standards, and DAAS policies. This includes project income policies, nutrition education policies, consumer eligibility and targeted mandates, documentation for the units of service and all reporting, and progress of service and outcome objectives; how consumer records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, verification that hours of operation are reflected with in most recent approved site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA nutrition program standards.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

## IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare data obtained from consumers using the Congregate program intake form, which includes the annual Nutrition Risk Screening, the loneliness screening, and the food security questions for all enrolled consumers by the due date as specified by OOA policy and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all consumer level service units in the Service Recording Tool and data for monthly service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives.
- D. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of meals served and number of nutrition compliance units provided.
- E. Grantee will enter the annual Outcome Objective metrics identified in Section VII of this Appendix A in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- G. Grantee will develop and maintain its OOA approved Site Chart. The site chart may be updated with the approval of OOA. A copy of the updated Site Chart will be kept in OOA's contractor program.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- I. Grantee will provide other reports as requested. Apart from the on-line reporting via CA-GetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas  
Contract Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120

Sarah Chan, RD  
Nutritionist/OOA  
1650 Mission Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103

	A	B	C	D	G	J	K	L	
1	<b>BUDGET FORMS</b>							Appendix B-6, pg. 1	
2								9/14/2017	
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>								
4	<b>BUDGET PROPOSAL FORMS</b>								
5	Grantee's Name: Project Open Hand						Grant Term		
6	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>								
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20				
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)	Cong-AWD	Cong-AWD Modification	Cong-AWD Revised	Cong-AWD Revised	Cong-AWD Revised	TOTAL	Average cost/meal	
9	<b>Annual #Meals Contracted</b>	<b>26,836</b>	<b>8,002</b>	<b>34,838</b>	<b>34,838</b>	<b>34,838</b>	<b>104,514</b>		
10	Program Term	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
11	<b>DAAS Expenditures</b>								
12	Salaries & Benefits	\$107,398		\$107,398	\$107,398	\$107,398	\$322,194	\$3.08	
13	Operating Expense	\$66,500	\$51,852	\$118,352	\$118,352	\$118,352	\$355,056	\$3.40	
14	<b>Subtotal</b>	<b>\$173,898</b>	<b>\$51,852</b>	<b>\$225,750</b>	<b>\$225,750</b>	<b>\$225,750</b>	<b>\$677,250</b>	<b>\$6.48</b>	
15	Indirect Percentage (max 10%)								
16	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)								
17	Capital Expenditure								
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$173,898</b>	<b>\$51,852</b>	<b>\$225,750</b>	<b>\$225,750</b>	<b>\$225,750</b>	<b>\$677,250</b>	<b>\$6.48</b>	
19	<b>Non-DAAS Expenditures</b>								
21	Salaries & Benefits	\$103,347		\$103,347	\$103,347	\$103,347	\$310,042	\$2.97	
22	Operating Expense	\$61,828		\$61,828	\$61,828	\$61,828	\$185,485	\$1.77	
23	Capital Expenditure								
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$165,176</b>		<b>\$165,176</b>	<b>\$165,176</b>	<b>\$165,176</b>	<b>\$495,527</b>	<b>\$4.74</b>	
25	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>								
26		<b>\$339,074</b>		<b>\$390,925</b>	<b>\$390,925</b>	<b>\$390,925</b>	<b>\$1,172,777</b>	<b>\$11.22</b>	
27	<b>HSA-DAAS Revenues</b>								
29	Meals	\$173,898	\$51,852	\$225,750	\$225,750	\$225,750	\$677,249		
30	Nutrition Compliance (if your agency is requesting funds)								
31									
32									
33									
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$173,898</b>	<b>\$51,852</b>	<b>\$225,750</b>	<b>\$225,750</b>	<b>\$225,750</b>	<b>\$677,249</b>		
35	PER MEAL COST, HSA-DAAS	\$6.48		\$6.48	\$6.48	\$6.48	\$6.48		
36	Per MEAL & COMPLIANCE COST	\$6.48		\$6.48	\$6.48	\$6.48	\$6.48		
37	<b>Non-DAAS Revenues</b>								
38	Project Income	\$10,466	\$3,121	\$13,587	\$13,587	\$13,587	\$40,760	\$0.39	
39	Agency Cash - Fundraising	\$43,901		\$43,901	\$43,901	\$43,901	\$131,704	\$1.26	
40	Agency Property	\$56,207		\$56,207	\$56,207	\$56,207	\$168,621	\$1.61	
41	Agency In-Kind Volunteer	\$51,481		\$51,481	\$51,481	\$51,481	\$154,442	\$1.48	
42	Nutrition Compliance Revenues								
43									
44	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$162,055</b>	<b>\$3,121</b>	<b>\$165,176</b>	<b>\$165,176</b>	<b>\$165,176</b>	<b>\$495,527</b>		
45	PER MEAL COST, NON HSA-DAAS			\$4.74	\$4.74	\$4.74	\$4.74		
46	<b>TOTAL REVENUES</b>	<b>\$335,953</b>					<b>\$1,172,776</b>		
47	PER MEAL COST, TOTAL	\$12.52					\$11.22		
48	Full Time Equivalent (FTE)								
49							Date:		
50	Prepared by: Darin Raffaelli						Date: 9/14/17		
51	HSA-CO Review Signature:								
52	HSA #1								

	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: Project Open Hand								Appendix B-6, page 2	
2	Program Name:								Date: 9/14/17	
3	Cong-AWD									
4										
5	<b>Salaries &amp; Benefits Detail</b>								<b>TOTAL</b>	

8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20
		Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
9	POSITION TITLE and NAME								
10	Asst Kitchen Supervisor - Open	\$35,901	100%	5.0%	5%	\$1,795	\$1,795	\$1,795	\$5,385
11	Catering Cook I - Martinez, Alma	\$30,296	100%	5.0%	5%	\$1,515	\$1,515	\$1,515	\$4,544
12	Chef de Cuisine - Walker, Lea	\$47,486	100%	5.0%	5%	\$2,374	\$2,374	\$2,374	\$7,123
13	Cook I - Open	\$27,581	100%	5.0%	5%	\$1,379	\$1,379	\$1,379	\$4,137
14	Cook I - Pensabene, Jaime	\$30,827	100%	5.0%	5%	\$1,541	\$1,541	\$1,541	\$4,624
15	Cook II - Barraza, Jonny	\$31,782	100%	5.0%	5%	\$1,589	\$1,589	\$1,589	\$4,767
16	Cook II - Guinto, Fernando	\$33,712	100%	5.0%	5%	\$1,686	\$1,686	\$1,686	\$5,057
17	Cook II - Ky, Bau	\$42,729	100%	5.0%	5%	\$2,136	\$2,136	\$2,136	\$6,409
18	Delivery Driver - Arboleda, Steven	\$30,296	100%	5.0%	5%	\$1,515	\$1,515	\$1,515	\$4,544
19	Delivery Driver - Flores Diaz, Narciso	\$30,296	100%	5.0%	5%	\$1,515	\$1,515	\$1,515	\$4,544
20	Delivery Driver - Kessel, Alfred	\$35,367	100%	5.0%	5%	\$1,768	\$1,768	\$1,768	\$5,305
21	Distribution Manager - Yowell, Scott	\$63,500	100%	5.0%	5%	\$3,175	\$3,175	\$3,175	\$9,525
22	Exec Chef - Barrow, Adrian	\$75,000	100%	3.7%	4%	\$2,775	\$2,775	\$2,775	\$8,325
23	Programs VP -- Open	\$105,000	100%	4.0%	4%	\$4,200	\$4,200	\$4,200	\$12,600
24	Site Coordinators - 26 pp.	\$450,375	1300%	5.0%	65%	\$22,519	\$22,519	\$22,519	\$67,556
25	Sites Manager -- Chong, Raymond	\$62,500	100%	5.0%	5%	\$3,125	\$3,125	\$3,125	\$9,375
26	Sites Manager -- Withers, Gina	\$62,500	100%	5.0%	5%	\$3,125	\$3,125	\$3,125	\$9,375
27	Sites Supervisor -- Giuffra, Merle	\$40,768	100%	5.0%	5%	\$2,038	\$2,038	\$2,038	\$6,115
28	Sites Supervisor -- Open	\$37,440	100%	5.0%	5%	\$1,872	\$1,872	\$1,872	\$5,616
29	Sites Supervisor -- Starr, Sharon	\$37,440	100%	5.0%	5%	\$1,872	\$1,872	\$1,872	\$5,616
30	Sites Supervisor -- Wong, Erika	\$38,480	100%	5.0%	5%	\$1,924	\$1,924	\$1,924	\$5,772
31	SLP Coordinator -- Aguilar, Miriam	\$51,792	100%	5.0%	5%	\$2,590	\$2,590	\$2,590	\$7,769
32	SLP Coordinator -- Open	\$51,792	100%	5.0%	5%	\$2,590	\$2,590	\$2,590	\$7,769
33	SLP Manager -- Mekler, Ariel	\$75,000	100%	5.0%	5%	\$3,750	\$3,750	\$3,750	\$11,250
34	Vol Services Coordinator - Karr, Renu	\$46,897	100%	5.0%	5%	\$2,345	\$2,345	\$2,345	\$7,035
35	TOTALS	\$ 1,574,759	3700%	123%	183%	\$76,713	\$76,713	\$76,713	\$230,139

36									
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37	FRINGE BENEFIT RATE	40.0%							
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38	EMPLOYEE FRINGE BENEFITS	\$ 629,904				\$30,685	\$30,685	\$30,685	\$92,055
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39									
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41	TOTAL DAAS SALARIES & BENEFITS	\$ 2,204,662				\$107,398	\$107,398	\$107,398	\$322,194
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40									
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44	Non - DAAS	Agency Totals		For DAAS Meal					TOTAL
		Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
45	POSITION TITLE and NAME								
46	Cook II - Carpio, Patrick	\$31,782	100%	1%	1%	\$286	\$286	\$286	\$857
47	Cook II - Lastima, Christian	\$31,782	100%	1%	1%	\$318	\$318	\$318	\$953
48	Cook II - Mcdaniel, Steven Lloyd	\$31,824	100%	5%	5%	\$1,591	\$1,591	\$1,591	\$4,774
49	Delivery Driver - Brown, Steven	\$31,209	100%	2%	2%	\$561	\$561	\$561	\$1,682
50	HR Administrator - Pealer, Matthew	\$45,760	100%	5%	5%	\$2,059	\$2,059	\$2,059	\$6,178
51	Kitchen Manager - Miles, Cassandra	\$62,000	100%	5%	5%	\$3,342	\$3,342	\$3,342	\$10,026
52	Lead Driver - Baltodano, Otto	\$33,657	100%	7%	7%	\$2,419	\$2,419	\$2,419	\$7,257
53	Lead Porter - Pryor, Gregory	\$35,285	100%	5%	5%	\$1,902	\$1,902	\$1,902	\$5,706
54	Operation Supervisor - Gilmore, Shann	\$57,780	100%	4%	4%	\$2,595	\$2,595	\$2,595	\$7,786
55	Operations Coordinator I - Lopez, Carlo	\$33,421	100%	4%	4%	\$1,501	\$1,501	\$1,501	\$4,504
56	Operations Coordinator III - Dennis, Ke	\$44,690	100%	4%	4%	\$2,007	\$2,007	\$2,007	\$6,022

	A	B	C	D	E	F	G	H	I	J
57	Operations Coordinator III - Murillo, Wil	\$35,714	100%	4%	4%		\$1,604	\$1,604	\$1,604	\$4,813
58	PM Production Coordinator - Matthews	\$33,330	100%	1%	1%		\$299	\$299	\$299	\$898
59	Porter I - Butler, Julius	\$29,066	100%	5%	5%		\$1,567	\$1,567	\$1,567	\$4,700
60	Porter I - Guinto, Ramon	\$30,827	100%	5%	5%		\$1,662	\$1,662	\$1,662	\$4,985
61	Porter I - Hamilton, Andrea	\$29,936	100%	5%	5%		\$1,614	\$1,614	\$1,614	\$4,841
62	Porter I - Open	\$28,111	100%	8%	8%		\$2,273	\$2,273	\$2,273	\$6,819
63	Porter I - Viray, Francisco	\$30,827	100%	5%	5%		\$1,662	\$1,662	\$1,662	\$4,985
64	Porter I - Wong, David	\$29,066	100%	5%	5%		\$1,567	\$1,567	\$1,567	\$4,700
65	Porter II - O'Donoghue, Cormac	\$31,209	100%	5%	5%		\$1,682	\$1,682	\$1,682	\$5,047
66	Sous Chef - Sousa, Antonio	\$40,560	100%	5%	5%		\$2,186	\$2,186	\$2,186	\$6,559
67	Staff Accountant - Ryan, Kelly	\$52,232	100%	5%	5%		\$2,350	\$2,350	\$2,350	\$7,051
68	Volunteers	\$51,481	100%	9%	9%		\$51,481	\$51,481	\$51,481	\$154,442
69	<b>TOTAL NON-DAAS</b>	\$ 861,548	2300%	109%	109%		<b>\$88,528</b>	<b>\$88,528</b>	<b>\$88,528</b>	<b>\$265,585</b>
70										
71	FRINGE BENEFIT RATE	40.0%								
72	EMPLOYEE FRINGE BENEFITS	\$ 324,027					\$ 14,819	\$ 14,819	\$ 14,819	\$44,457
73										
74										
75	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 1,185,575</b>					<b>\$103,347</b>	<b>\$103,347</b>	<b>\$103,347</b>	<b>\$310,042</b>
76										
77	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 3,390,237</b>					<b>\$210,745</b>	<b>\$210,745</b>	<b>\$210,745</b>	<b>\$632,236</b>
78	<b>HSA #2</b>									

Form Rev. 12/22/16

	A	B	C	D	E	F	G	H
1	Grantee's Name: Project Open Har						Appendix B-6, page 3	
2	Program Name:						Date: 9/14/17	
3	<b>Cong-AWD</b>							
4	<b>Operating Expense Detail</b>							
5								
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	34,838	34,838	34,838	<b>TOTAL</b>		
8	Expenditure Category	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property							
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$3,704	\$3,704	\$3,704	\$11,112		
11	Office Supplies, Postage							
12	Building Maintenance Supplies and Repair							
13	<b>FOOD COSTS</b>							
14	Raw Food	per meal \$ 2.03	\$70,547	\$70,547	\$70,547	\$211,641		
15	Cong Food Svc Supplies	per meal \$ 0.32	\$10,974	\$10,974	\$10,974	\$32,922		
16	HDM Food Svc Supplies	per meal \$ -						
17	Catered Meals	per meal \$ -						
18	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
19	Security		\$21,000	\$21,000	\$21,000	\$63,000		
20								
21	<b>OTHER COSTS:</b>							
22	Insurance							
23	Staff Training & Travel		\$6,027	\$6,027	\$6,027	\$18,081		
24	Rental of Equipment							
25	Small equipment & Supplies		\$5,000	\$5,000	\$5,000	\$15,000		
26	Auto - Fuel & Insurance							
27	Repair/Maintenance							
28	Telephone/Data Communication		\$1,100	\$1,100	\$1,100	\$3,300		
29								
30	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$118,352</b>	<b>\$118,352</b>	<b>\$118,352</b>	<b>\$355,056</b>		
32	<b>Non-DAAS</b>						<b>TOTAL</b>	
33	<b>Expenditure Category</b>							
34	Rental of Property		\$56,207	\$56,207	\$56,207	\$168,621		
35	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$2,328	\$2,328	\$2,328	\$6,985		
36	Office Supplies, Postage		\$200	\$200	\$200	\$600		
37	Building Maintenance Supplies and Repair		\$350	\$350	\$350	\$1,050		
38	<b>FOOD COSTS</b>							
39	Raw Food	per meal \$ -						
40	Cong Food Svc Supplies	per meal \$ -						
41	HDM Food Svc Supplies	per meal \$ -						
42	Catered Meals	per meal \$ -						
43	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
44	Registered Dietitian							
45								
46	<b>OTHER COSTS:</b>							
47	Insurance							
48	Staff Training & Travel		\$900	\$900	\$900	\$2,700		
49	Rental of Equipment							
50	Small equipment & Supplies		\$500	\$500	\$500	\$1,500		
51	Auto - Fuel & Insurance		\$1,343	\$1,343	\$1,343	\$4,029		
52	Repair/Maintenance							
53								
55	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$61,828</b>	<b>\$61,828</b>	<b>\$61,828</b>	<b>\$185,485</b>		
56								
57	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$180,180</b>	<b>\$180,180</b>	<b>\$180,180</b>	<b>\$540,541</b>		
62	<b>HSA #3</b>							

Form Rev. 12/22/16

**Appendix A3 – Services to be Provided  
Meals on Wheels of San Francisco  
Home-Delivered Meals for Adults with Disabilities (HDM-AWD)  
Effective July 1, 2017-June 30, 2020**

**I. Purpose**

The purpose of this grant is to assist adults with disabilities living in San Francisco and identified by Grantee as its target population to live independently, by promoting better health through improved nutrition, and reduced isolation through accessible and appropriate meals services.

**II. Definitions-**

Grantee	Meals on Wheels of San Francisco
ADL	Activities of Daily Living: the basic tasks of everyday life including eating, bathing, dressing, toileting, and transferring (i.e., getting in and out of a bed or chair).
AWD	Adults with Disabilities are adults age 18-59 with disability.
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
CRFC	California Retail Food Code establishes uniform health and sanitation standards for retail food facilities for regulation by the State Department of Public Health, and requires local health agencies to enforce these provisions.
DAAS	Department of Aging and Adult Services
Disability	<p>A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.</p> <p><i>Physical disability or mobile limitation</i> includes wheelchair users, cane or walker users, limited reach ranges, limited hand movement, etc. <i>Chronic illness</i> includes HIV, lung disorders, heart disease/stroke, immune system disorders, diabetes, neurological disorders, etc. <i>Sensory disability</i> includes deaf, hard of hearing, blind, low vision, Aphasia, stuttering, etc. <i>Mental disability</i> includes psychiatric disabilities, depression, anxiety, obsessive-compulsive disorder, phobias, schizophrenia, bi-polar disorder, borderline personality disorder, etc. <i>Cognitive disability</i> includes Down’s syndrome, traumatic brain injury, learning disabilities, etc.</p>

Frail	A functionally impaired individual who is either: (a) unable to perform at least two ADL (Activities of Daily Living), including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, or IADL (Instrumental Activities of Daily Living) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) having a cognitive or other mental impairment that requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
HSA	Human Services Agency of the City and County of San Francisco
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
Home-Delivered Meals (HDM)	Home-delivered meals are provided to consumers who are frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals. HDM programs consist of the procurement, preparation, service and delivery of meals, as well as nutrition education and nutrition counseling. This service requires an annual comprehensive assessment and quarterly re-evaluation of the HDM consumer. The HDM consumer must also have a home visit reassessment by their service providers at least every other quarter. Home Delivered Meals are provided to consumers who have substantial mental and/or physical impairments and lack a support network or resources that result is no safe, healthy alternative for meals. HDM programs consist of the procurement, preparation, service and delivery of meals, as well as nutrition education and counseling. This service requires quarterly reevaluation of the HDM consumer by the grantee and an annual comprehensive assessment by a DAAS approved service provider.
IADL	Instrumental Activities of Daily Living: activities related to independent living and include preparing meals, managing money, shopping for groceries or personal items, performing light or heavy housework, and using a telephone
Low-Income	200% of poverty level. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the Dietary Reference Intakes (DRI) (c) At a minimum, values must be determined for calories, protein, fat, saturated fat, fiber, calcium, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, and vitamin B12.
Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans (DGA), published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the grantee provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the grantee provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.



Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Nutrition Counseling	Provision of medical nutrition therapy counseling and referral to other appropriate service to consumers who are receiving special diets, or who are screened to be at high nutrition risk by DETERMINE Your Nutritional Health tool. This service is provided by a Registered Dietitian.
Nutrition Education	The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, and materials. The nutrition education for the HDM consumer may be written nutrition education material in a variety of forms, including but not limited to information sheets, brochures, and booklets. The nutrition education provided shall be based on the needs of the consumers as determined by annual the consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. Nutrition education shall be provided on a quarterly basis and documented. One set of materials is defined as one nutrition education unit provided to one consumer.
OOA	Office on the Aging
Registered Dietitian (RD) – Registered Dietitian Nutritionist (RDN)	Registered Dietitian or Registered Dietitian Nutritionist. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration. A Registered Dietitian (R.D.) shall be covered by professional liability insurance either individually (if a consultant) or through Grantee.
SOGI	Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9</i> ).

### III. Target Population

The target population is residents of San Francisco County, between the ages of 18-59 who have a disability as defined in Section II, Definitions.. OOA targets individuals who have the greatest economic and social need such as living on low-income, are minorities, possessing non- or limited-English skills, or are lesbian/gay/bisexual/transgender.

### IV. Eligibility for Services

To participate in Home-Delivered Meals, the consumer must meet the following criteria: A consumer, between the age of 18-59 who has *substantial* mental and/or physical impairments and lack a support network or resources that result in no safe, healthy alternative for meals. Substantial impairments include one or more of the following:

- Self-Care: ADL and IADL, especially grocery shopping and meal preparation and that the consumer lacks the ability to obtain safe, healthy meals.
- Capacity for independent living and self-direction
- Cognitive functioning and emotional adjustment

**V. Services to be Provided**

- A. Develop and maintain HDM program policies and procedures that are in compliance with and meet the nutrition and food service standards set forth by the most recent California Retail Food Code and OOA Policies and include nutrition education for HDM consumers. Policy and procedures shall ensure the provision of quality meals, adequate access to sound nutrition information enabling consumers to reduce incidence of chronic diseases and maintain independent living.
- B. Provide home-delivered meal services, which include:
1. Enroll the number of unduplicated consumers annually as indicated in Table A, and in the various neighborhood and/or districts as indicated in the DAAS-OOA approved Site Chart.
  2. Provide the total number of AWD meals annually as indicated in Table A. The meals will be delivered to neighborhoods and/or districts as indicated on the DAAS-OOA approved Site Chart. Each meal shall meet the OOA menu requirements. Meals offered may be hot, chilled or frozen, regular or modified meals as approved by DAAS-OOA, and as determined appropriate for the population served.
  3. Documenting, tracking and reporting consumers' condition changes to citywide HDM Assessment contractor that would affect the consumer's eligibility to continue receiving HDM services.
  4. Meet with the citywide HDM-AWD assessment contractor at least on a quarterly basis to review services, utilization, and condition change documentation. Grantee must also establish a policy & procedure to communicate with the HDM-AWD assessment provider, as needed, to discuss any issues that may arise pertaining to the HDM-AWD consumer or the service provided.
  5. Provide at least one set of nutrition education material to consumers on a quarterly basis. The total units of nutrition education will be as indicated on the OOA approved Site Chart. The service units will be reported in CA-GetCare in the month that the service is provided.
  6. A suggested donation per meal requested of each participant must be approved by the Grantee's Board of Directors and OOA in advance.
  7. Service units:

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	471	471	471	1,413
#Meals	220,888	220,888	220,888	662,664

- C. Ensure central kitchen (or caterer kitchen) and the home-delivered meal routes meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and

documented by a R.D. based on the number of monitoring approved in the Grantee's budget. Grantee with four or more delivery routes will conduct a HDM route monitoring at least once a month. In-service training to address any monitoring findings and/or to reinforce best practices will be scheduled and conducted in a timely manner to bring the program into compliance. The HACCP monitoring reports for the production kitchen and HDM routes shall be sent to OOA on a timely basis and no later than once per quarter.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist as defined by OOA policy memoranda. The survey tool will be provided by OOA.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the quarterly in-service training coordinated and provided by the OOA, and share the information with their staff and volunteers.
- J. The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.
- L. Grantee will develop and provide each consumer with a welcome packet that includes at minimum, the following information: the agency's meal delivery schedule, sample menu, donation policy and collection procedures, procedures to change meal delivery request, grievance policy, and how to request assistance, if needed.

#### **VI. Service Objectives**

- A. Grantee will serve the total number of unduplicated consumers as indicated in Table A in Section V.
- B. Grantee will provide the total number of meals as indicated in Table A, Section V.

#### **VII. Outcome Objectives**

- A. At least 85% of consumers will report being satisfied with the meal quality as defined as "Excellent or Good" in the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee's average number of meals served at each congregate meal site.
- B. At least 75% of the consumers will report that the meal service helps maintain their independence based on the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee's average number of meals served daily.
- C. At least 65% of consumers will report an increase in the consumption of fruits and vegetables as evidenced by a reported change from previous baseline data in the Nutrition Risk Screening Tool or other appropriate evaluation data.
- D. At least 65% of consumers with a high nutrition risk score as defined by the "Determine Your Nutritional Health" checklist will be connected to additional and appropriate resources.

- E. At least 65% of consumers that are identified as "lonely" as evidenced by the DAAS adopted loneliness screening tool will be connected to additional and appropriate resources.

## VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and HDM routes in accordance with CRFC and DAAS policies and nutrition standards. This includes project income policies, nutrition education policies, consumer eligibility and targeted mandates, documentation of the units of service and all reporting, and progress of service and outcome objectives; how consumer records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to the nutrition program operation, current organizational chart in the nutrition service department, grievance policies and procedures, verification that hours of operation are reflected in most recent approved site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

## IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare any updates in the consumer's demographic data obtained from consumers when conducting a quarterly assessment or any other time a consumer may provide new information.
- B. Grantee will enter into CA-GetCare all the consumer level service units in the Service Recording Tool and data for monthly service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI, Service Objectives.
- D. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of meals served and number of nutrition compliance units provided.
- E. Grantee will enter the annual Outcome Objective metrics identified in Section VII of this appendix A in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 (or as amended) each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- G. Grantee will develop and maintain its OOA approved Site Chart. The site chart may be updated with the approval of OOA. A copy of the updated Site Chart will be kept in OOA's contractor program.

- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- I. Grantee will provide other reports as requested. Apart from the on-line reporting via Ca-GetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Tahir Shaikh  
Contracts Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)

Sarah Chan  
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1650 Mission Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103  
[Sarah.Chan@sfgov.org](mailto:Sarah.Chan@sfgov.org)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	BUDGET FORMS												
2													Appendix B4, pg
3													9/15/2017
4	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES BUDGET PROPOSAL FORMS												
5	Grantee's Name: Meals on Wheels San												Grant Term
6	(Check One) <input type="checkbox"/> New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification												
7	Effective Date of Mod: No. of Mod:												7/1/17 to 6/30/2
8	Program: Enter Program Only (e.g. Cong-ENP, HDM-ENP, HDM-AWD)												
9	Annual #Meals Contracted	172,777	48,111	220,888	172,777	48,111	220,888	172,777	48,111	220,888	518,331	144,333	662,664
10	Program Term	17/18 Original	7/18 Add Back	17/18 Total	18/19 Original	18/19 Add Back	18/19 Total	19/20 Original	19/20 Add Back	19/20 Total	7/18-19/20 Origin	7/18-19/20 Add Back	7/18-19/20 Total
11	DAAS Expenditures												
12	Salaries & Benefits	\$201,717	\$56,172	\$257,889	\$201,717	\$56,172	\$257,889	\$201,717	\$56,172	\$257,889	\$605,150	\$168,516	\$773,667
13	Operating Expense	\$570,597	\$158,885	\$729,482	\$570,597	\$158,885	\$729,482	\$570,597	\$158,885	\$729,482	\$1,711,791	\$476,655	\$2,188,446
14	Subtotal	\$772,314	\$215,057	\$987,371	\$772,314	\$215,057	\$987,371	\$772,314	\$215,057	\$987,371	\$2,316,941	\$645,171	\$2,962,113
15	Indirect Percentage (max 10%)												
16	Indirect Cost (Line 15 X Line 14, check Gen. Guidance regarding indirect exclusion)												
17	TOTAL DAAS EXPENDITURES	\$772,314	\$215,057	\$987,371	\$772,314	\$215,057	\$987,371	\$772,314	\$215,057	\$987,371	\$2,316,941	\$645,171	\$2,962,113
19	Non-DAAS Expenditures												
21	Salaries & Benefits	\$97,389	\$27,117	\$124,506	\$97,389	\$27,117	\$124,506	\$97,389	\$27,117	\$124,506	\$292,166	\$81,351	\$373,517
22	Operating Expense	\$189,945	\$52,892	\$242,837	\$189,945	\$52,892	\$242,837	\$189,945	\$52,892	\$242,837	\$569,835	\$158,676	\$728,511
23	Indirect Expense	\$85,523	\$23,814	\$109,337	\$85,523	\$23,814	\$109,337	\$85,523	\$23,814	\$109,337	\$266,568	\$71,443	\$328,011
24	Capital Expenditure												
25	TOTAL NON-DAAS EXPENDITURES	\$372,856	\$103,824	\$476,680	\$372,856	\$103,824	\$476,680	\$372,856	\$103,824	\$476,680	\$1,118,569	\$311,471	\$1,430,039
26	TOTAL DAAS & NON-DAAS EXPENDITURES	\$1,145,170	\$318,881	\$1,464,050	\$1,145,170	\$318,881	\$1,464,050	\$1,145,170	\$318,881	\$1,464,050	\$3,435,509	\$956,642	\$4,392,152
29	HSA-DAAS Revenues												
30	Meals	\$772,314	\$215,057	\$987,371	\$772,314	\$215,057	\$987,371	\$772,314	\$215,057	\$987,371	\$2,316,941	\$645,171	\$2,962,112
31	Nutrition Compliance (if your agency is requesting funds)												
32													
33													
34													
35	TOTAL HSA-DAAS REVENUES	\$772,314	\$215,057	\$987,371	\$772,314	\$215,057	\$987,371	\$772,314	\$215,057	\$987,371	\$2,316,941	\$645,171	\$2,962,112
36	PER MEAL COST, HSA-DAAS	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47
37	PER MEAL & COMPLIANCE COS	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47	\$4.47
38	Non-DAAS Revenues												
39	Project Income												
40	Agency Cash - Fundraising	\$301,247	\$83,885	\$385,131	\$301,247	\$83,885	\$385,131	\$301,247	\$83,885	\$385,131	\$903,741	\$251,654	\$1,155,394
41	Agency in-Kind Volunteer	\$71,609	\$19,939	\$91,548	\$71,609	\$19,939	\$91,548	\$71,609	\$19,939	\$91,548	\$214,828	\$59,817	\$274,645
42	Nutrition Compliance Revenues												
43													
44	TOTAL NON HSA-DAAS REVENUES	\$372,856	\$103,824	\$476,680	\$372,856	\$103,824	\$476,680	\$372,856	\$103,824	\$476,680	\$1,118,569	\$311,471	\$1,430,039
45	PER MEAL COST, NON HSA-DAAS	\$2.16	\$2.16	\$2.16	\$2.16	\$2.16	\$2.16	\$2.16	\$2.16	\$2.16	\$2.16	\$2.16	\$2.16
46	TOTAL REVENUES	\$1,145,170	\$318,881	\$1,464,050	\$1,145,170	\$318,881	\$1,464,050	\$1,145,170	\$318,881	\$1,464,050	\$3,435,509	\$956,642	\$4,392,151
47	PER MEAL COST, TOTAL	\$6.63	\$6.63	\$6.63	\$6.63	\$6.63	\$6.63	\$6.63	\$6.63	\$6.63	\$6.63	\$6.63	\$6.63
48	Full Time Equivalent (FTE)												
50	Prepared by: Patrick Schmalz	Phone No.: 415-343-1270		Date: 9/15/17									
51	HSA-CO Review Signature:	Date:											
52	HSA #1	Form Rev. 12/22/16											

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Grantee's Name: Meals on Wheels San Francisco																Appendix B4, page 2	
2	Program Name: HDM-AWD																Date: 9/15/17	
3	HDM-AWD																TOTAL	
4	<b>Salaries &amp; Benefits Detail</b>																	
5	<b>H.S.A-DAAS</b>																	
6	Agency Totals		For DAAS Nutrition			17/18 Original	17/18 Add Back	17/18 Total	18/19 Original	18/19 Add Back	18/19 Total	19/20 Original	19/20 Add Back	19/20 Total	17/18-19/20 Original	17/18-19/20 Add Back	17/18-19/20 Total	
7	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
8	POSITION TITLE and NAME																	
9	Drivers	See Driver Tab			\$81,542	\$22,706	\$104,248	\$81,542	\$22,706	\$104,248	\$81,542	\$22,706	\$104,248	\$244,627	\$68,118	\$312,745		
10	Programs Mgr, Mark Little	\$70,380	100%	7%	\$5,160	\$1,437	\$6,597	\$5,160	\$1,437	\$6,597	\$5,160	\$1,437	\$6,597	\$15,481	\$4,311	\$19,792		
11	Ops Mgr, Gustavo Lopez	\$76,888	100%	7%	\$5,637	\$1,570	\$7,207	\$5,637	\$1,570	\$7,207	\$5,637	\$1,570	\$7,207	\$16,812	\$4,710	\$21,522		
12	Wait List Mgr, Crystal Booth	\$61,118	100%	7%	\$4,481	\$1,248	\$5,729	\$4,481	\$1,248	\$5,729	\$4,481	\$1,248	\$5,729	\$13,444	\$3,744	\$17,188		
13	Office Mgr, Harviann Brantley	\$53,030	100%	6%	\$3,244	\$903	\$4,147	\$3,244	\$903	\$4,147	\$3,244	\$903	\$4,147	\$9,732	\$2,709	\$12,441		
14	Support Lead, Philip Duarte	\$43,231	100%	7%	\$3,170	\$883	\$4,053	\$3,170	\$883	\$4,053	\$3,170	\$883	\$4,053	\$9,506	\$2,649	\$12,155		
15	Support Lead, Ivoga Suesue	\$56,594	100%	7%	\$4,150	\$1,155	\$5,305	\$4,150	\$1,155	\$5,305	\$4,150	\$1,155	\$5,305	\$12,448	\$3,485	\$15,933		
16	Chief Prog Off, David Linnell	\$139,725	100%	7%	\$9,214	\$2,568	\$11,782	\$9,214	\$2,568	\$11,782	\$9,214	\$2,568	\$11,782	\$27,642	\$7,598	\$35,240		
17	Chief Gov Off, Anne Quaintano	\$135,985	100%	5%	\$7,355	\$2,048	\$9,403	\$7,355	\$2,048	\$9,403	\$7,355	\$2,048	\$9,403	\$22,055	\$6,144	\$28,200		
18	Fleet & Facilities Dir, John Shea	\$81,765	100%	4%	\$3,534	\$984	\$4,518	\$3,534	\$984	\$4,518	\$3,534	\$984	\$4,518	\$10,601	\$2,852	\$13,453		
19	Maintenance, Derek Cook	\$43,748	100%	4%	\$1,891	\$528	\$2,419	\$1,891	\$528	\$2,419	\$1,891	\$528	\$2,419	\$5,612	\$1,578	\$7,190		
20	Volunteer Mgr, Kathleen Stirling	\$62,100	100%	6%	\$3,794	\$1,057	\$4,851	\$3,794	\$1,057	\$4,851	\$3,794	\$1,057	\$4,851	\$11,383	\$3,171	\$14,554		
21	Volunteer Mgr, TBD	\$62,100	100%	6%	\$3,794	\$1,057	\$4,851	\$3,794	\$1,057	\$4,851	\$3,794	\$1,057	\$4,851	\$11,383	\$3,171	\$14,554		
22	Volunteer Director, Meredith Te	\$87,975	100%	6%	\$5,375	\$1,497	\$6,872	\$5,375	\$1,497	\$6,872	\$5,375	\$1,497	\$6,872	\$16,126	\$4,491	\$20,617		
23	HR Manager, Ronald Ayotte	\$77,625	100%	3%	\$2,862	\$714	\$3,576	\$2,862	\$714	\$3,576	\$2,862	\$714	\$3,576	\$7,587	\$2,142	\$9,729		
24	HR Associate, David C Smith	\$43,056	100%	3%	\$1,421	\$396	\$1,817	\$1,421	\$396	\$1,817	\$1,421	\$396	\$1,817	\$4,264	\$1,188	\$5,452		
25	Communications Director, Karl	\$119,025	100%	1%	\$1,313	\$366	\$1,679	\$1,313	\$366	\$1,679	\$1,313	\$366	\$1,679	\$3,938	\$1,098	\$5,036		
26	Digital Marketing Manager, Karl	\$61,926	100%	1%	\$683	\$190	\$873	\$683	\$190	\$873	\$683	\$190	\$873	\$2,049	\$570	\$2,619		
27	CEO, Ashley McCumber	\$212,175	100%															
28	TOTALS	\$ 1,491,045	1800%	90%	\$148,321	\$41,303	\$189,624	\$148,321	\$41,303	\$189,624	\$148,321	\$41,303	\$189,624	\$444,963	\$123,906	\$568,872		
29	FRINGE BENEFIT RATE	36.0%																
30	EMPLOYEE FRINGE BENEFITS	\$ 536,776			\$53,396	\$14,869	\$68,265	\$53,396	\$14,869	\$68,265	\$53,396	\$14,869	\$68,265	\$160,188	\$44,507	\$204,795		
31	TOTAL DAAS SALARIES & BENEFITS	\$ 2,027,822			\$201,717	\$56,172	\$257,889	\$201,717	\$56,172	\$257,889	\$201,717	\$56,172	\$257,889	\$605,151	\$168,413	\$773,667		
32	<b>Non - DAAS</b>																	
33	Agency Totals		For DAAS Meal			TOTAL						TOTAL						
34	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
35	POSITION TITLE and NAME																	
36	Drivers	See Driver Tab			\$39,389	\$10,962	\$50,351	\$39,389	\$10,962	\$50,351	\$39,389	\$10,962	\$50,351	\$118,106	\$32,888	\$150,992		
37	Programs Mgr, Mark Little	\$ 70,380	100%	3%	\$1,765	\$491	\$2,256	\$1,765	\$491	\$2,256	\$1,765	\$491	\$2,256	\$5,295	\$1,473	\$6,768		
38	Ops Mgr, Gustavo Lopez	\$ 76,888	100%	3%	\$1,928	\$537	\$2,465	\$1,928	\$537	\$2,465	\$1,928	\$537	\$2,465	\$5,785	\$1,611	\$7,396		
39	Wait List Mgr, Crystal Booth	\$ 61,118	100%	3%	\$1,533	\$427	\$1,960	\$1,533	\$427	\$1,960	\$1,533	\$427	\$1,960	\$4,598	\$1,281	\$5,879		
40	Office Mgr, Harviann Brantley	\$ 56,030	100%	2%	\$1,110	\$309	\$1,419	\$1,110	\$309	\$1,419	\$1,110	\$309	\$1,419	\$3,329	\$927	\$4,256		
41	Support Lead, Philip Duarte	\$ 43,231	100%	3%	\$1,084	\$302	\$1,386	\$1,084	\$302	\$1,386	\$1,084	\$302	\$1,386	\$3,268	\$906	\$4,174		
42	Support Lead, Ivoga Suesue	\$ 56,594	100%	3%	\$1,419	\$395	\$1,814	\$1,419	\$395	\$1,814	\$1,419	\$395	\$1,814	\$4,268	\$1,185	\$5,453		
43	Chief Prog Off, David Linnell	\$ 139,725	100%	2%	\$3,152	\$878	\$4,030	\$3,152	\$878	\$4,030	\$3,152	\$878	\$4,030	\$9,465	\$2,634	\$12,099		
44	Chief Gov Off, Anne Quaintano	\$ 135,985	100%	2%	\$2,516	\$701	\$3,217	\$2,516	\$701	\$3,217	\$2,516	\$701	\$3,217	\$7,547	\$2,103	\$9,650		
45	Fleet & Facilities Dir, John Shea	\$ 81,765	100%	1%	\$1,209	\$337	\$1,546	\$1,209	\$337	\$1,546	\$1,209	\$337	\$1,546	\$3,626	\$1,011	\$4,637		
46	Maintenance, Derek Cook	\$ 43,748	100%	1%	\$647	\$180	\$827	\$647	\$180	\$827	\$647	\$180	\$827	\$1,940	\$540	\$2,480		
47	Volunteer Mgr, Kathleen Stirling	\$ 62,100	100%	2%	\$1,298	\$361	\$1,659	\$1,298	\$361	\$1,659	\$1,298	\$361	\$1,659	\$3,894	\$1,083	\$4,977		
48	Volunteer Mgr, TBD	\$ 62,100	100%	2%	\$1,298	\$361	\$1,659	\$1,298	\$361	\$1,659	\$1,298	\$361	\$1,659	\$3,894	\$1,083	\$4,977		
49	Volunteer Director, Meredith Te	\$ 87,975	100%	2%	\$1,838	\$512	\$2,350	\$1,838	\$512	\$2,350	\$1,838	\$512	\$2,350	\$5,516	\$1,536	\$7,052		
50	HR Manager, Ronald Ayotte	\$ 77,625	100%	1%	\$876	\$244	\$1,120	\$876	\$244	\$1,120	\$876	\$244	\$1,120	\$2,628	\$732	\$3,360		
51	HR Associate, David C Smith	\$ 43,056	100%	1%	\$486	\$135	\$621	\$486	\$135	\$621	\$486	\$135	\$621	\$1,458	\$405	\$1,863		
52	Communications Director, Karl	\$ 119,025	100%	0%	\$449	\$125	\$574	\$449	\$125	\$574	\$449	\$125	\$574	\$1,347	\$375	\$1,722		
53	Digital Marketing Manager, Karl	\$ 61,926	100%	0%	\$234	\$65	\$299	\$234	\$65	\$299	\$234	\$65	\$299	\$701	\$196	\$897		
54	CEO, Ashley McCumber	\$ 212,175	100%	4%	\$9,399	\$2,617	\$12,016	\$9,399	\$2,617	\$12,016	\$9,399	\$2,617	\$12,016	\$28,198	\$7,861	\$36,059		
55	TOTAL NON-DAAS	\$ 1,491,045	1800%	35%	\$71,809	\$19,939	\$91,748	\$71,809	\$19,939	\$91,748	\$71,809	\$19,939	\$91,748	\$214,828	\$69,817	\$284,645		
56	FRINGE BENEFIT RATE	36.0%																
57	EMPLOYEE FRINGE BENEFITS	\$ 536,776			\$25,779	\$7,178	\$32,957	\$25,779	\$7,178	\$32,957	\$25,779	\$7,178	\$32,957	\$77,338	\$21,534	\$98,872		
58	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 2,027,822			\$97,588	\$27,117	\$124,705	\$97,588	\$27,117	\$124,705	\$97,588	\$27,117	\$124,705	\$282,186	\$81,351	\$363,537		
59	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 4,055,644			\$299,305	\$83,289	\$382,594	\$299,305	\$83,289	\$382,594	\$299,305	\$83,289	\$382,594	\$687,149	\$205,257	\$892,406		

HDM/AWD	LNAME	FNAME	HRS_YR	FTE	Dept	Salary	FRINGE	Comp	Total % FTE	% Nur Prog (b)	Adjusted Nur FTE	DAAS %	DAAS Budgeted Salary	Non DAAS %	Non Daas	
	Birch	Stephanie	2,080	1.00	Driver	\$32,197			100%	9.8%	9.8%	6.6%	\$2,137	32.6%	\$1,032	
	Chen	Daniel	2,080	1.00	Driver	\$53,263			100%	9.8%	9.8%	6.6%	\$3,535	3.2%	\$1,707	
	Dearaujo	Cleunir	2,080	1.00	Driver	\$32,298			100%	9.8%	9.8%	6.6%	\$2,143	3.2%	\$1,035	
	Fleming	James	1,248	1.00	Driver	\$32,601			100%	9.8%	9.8%	6.6%	\$2,163	3.2%	\$1,045	
	Gardner	Preston	2,080	1.00	Driver	\$35,083			100%	9.8%	9.8%	6.6%	\$2,328	3.2%	\$1,124	
	Gomez	Francisco	2,080	1.00	Driver	\$37,007			100%	9.8%	9.8%	6.6%	\$2,456	3.2%	\$1,186	
	Harrington	Gerard	2,080	1.00	Driver	\$35,731			100%	9.8%	9.8%	6.6%	\$2,371	3.2%	\$1,145	
	Hernandez	Waskar	2,080	1.00	Driver	\$32,855			100%	9.8%	9.8%	6.6%	\$2,180	3.2%	\$1,053	
	Huang	Xing	2,080	1.00	Driver	\$35,896			100%	9.8%	9.8%	6.6%	\$2,382	3.2%	\$1,150	
	Ishida	Phillip	2,080	1.00	Driver	\$34,211			100%	9.8%	9.8%	6.6%	\$2,270	3.2%	\$1,096	
	Kelley	Shella	2,080	1.00	Driver	\$33,853			100%	9.8%	9.8%	6.6%	\$2,247	3.2%	\$1,085	
	Kwong	Raymond	2,080	1.00	Driver	\$37,489			100%	9.8%	9.8%	6.6%	\$2,488	3.2%	\$1,201	
	Lae	Karnari	2,080	1.00	Driver	\$38,598			100%	9.8%	9.8%	6.6%	\$2,561	3.2%	\$1,237	
	Letuane	Fou	2,080	1.00	Driver	\$31,286			100%	9.8%	9.8%	6.6%	\$2,076	3.2%	\$1,002	
	Maher	Antoinette	2,080	1.00	Driver	\$46,351			100%	9.8%	9.8%	6.6%	\$3,076	3.2%	\$1,485	
	Maldonado	Michael	2,080	1.00	Driver	\$38,250			100%	9.8%	9.8%	6.6%	\$2,538	3.2%	\$1,225	
	Marcos Aragon	Noel	2,080	1.00	Driver	\$39,850			100%	9.8%	9.8%	6.6%	\$2,644	3.2%	\$1,277	
	Mejia	Felipe Ernest	2,080	1.00	Driver	\$34,918			100%	9.8%	9.8%	6.6%	\$2,317	3.2%	\$1,119	
	Pornelle	Alafale	2,080	1.00	Driver	\$46,769			100%	9.8%	9.8%	6.6%	\$3,104	3.2%	\$1,498	
	Price	Bianca	2,080	1.00	Driver	\$35,235			100%	9.8%	9.8%	6.6%	\$2,338	3.2%	\$1,129	
	Sandoval	Adrian	2,080	1.00	Driver	\$36,952			100%	9.8%	9.8%	6.6%	\$2,452	3.2%	\$1,184	
	Sarmiento	Germana	2,080	1.00	Driver	\$43,082			100%	9.8%	9.8%	6.6%	\$2,859	3.2%	\$1,380	
	Sefo	Viena	2,080	1.00	Driver	\$49,226			100%	9.8%	9.8%	6.6%	\$3,267	3.2%	\$1,577	
	Torres	Martha	2,080	1.00	Driver	\$37,620			100%	9.8%	9.8%	6.6%	\$2,497	3.2%	\$1,205	
	Torres	Rigoberto	2,080	1.00	Driver	\$43,731			100%	9.8%	9.8%	6.6%	\$2,902	3.2%	\$1,401	
	Vega	Rene	1,664	1.00	Driver	\$37,041			100%	9.8%	9.8%	6.6%	\$2,458	3.2%	\$1,187	
	Yee	Roland	2,080	1.00	Driver	\$46,340			100%	9.8%	9.8%	6.6%	\$3,075	3.2%	\$1,485	
	Zitsman	Mark	2,080	1.00	Driver	\$37,439			100%	9.8%	9.8%	6.6%	\$2,484	3.2%	\$1,199	
	Open: 11/1 Emp List, MOWSF Bdgt, CCSF Bdgt		2,080	1.00	Driver	\$38,399			100%	9.8%	9.8%	6.6%	\$2,548	3.2%	\$1,230	
	Open: 11/1 Emp List, MOWSF Bdgt		2,080	1.00	Driver	\$38,399			100%	9.8%	9.8%	6.6%	\$2,548	3.2%	\$1,230	
	Open: 11/1/16 Emp List		2,080	1.00	Driver	\$38,399			100%	9.8%	9.8%	6.6%	\$2,548	3.2%	\$1,230	
	New In 17/18		2,080	1.00	Driver	\$38,399			100%	9.8%	9.8%	6.6%	\$2,548	3.2%	\$1,230	
	<b>Total Original Approved Budget</b>			<b>32.00</b>		<b>\$1,228,769</b>							<b>\$81,542</b>		<b>\$39,369</b>	<b>\$120,911</b>



Operating Expense Detail

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Grantor's Name: Meals on Wheels San Francisco														
2	Program Name:														
3	HDM-AWD														
4															
7	HSA-DAAS	Annual #Meals Contracted:	172,777	48,111	TOTAL	172,777	48,111	TOTAL	172,777	48,111	TOTAL	172,777	48,111	TOTAL	172,777
8	Expenditure Category	Term:	17/18 Original	17/18 Add Back	17/18 Total	18/19 Original	18/19 Add Back	18/19 Total	19/20 Original	19/20 Add Back	19/20 Total	17/18-19/20 Original	17/18-19/20 Add Back	17/18-19/20 Total	
9	Rental of Property														
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$3,596	\$1,001	\$4,597	\$3,596	\$1,001	\$4,597	\$2,703	\$753	\$3,456	\$10,768	\$9,109	\$2,259	
11	Office Supplies, Postage		\$2,703	\$753	\$3,456	\$5,171	\$1,440	\$6,611	\$5,171	\$1,440	\$6,611	\$15,513	\$4,320	\$19,833	
12	Building Maintenance Supplies and Repair		\$5,171	\$1,440	\$6,611										
13	FOOD COSTS	per meal \$													
14	Raw Food	per meal \$													
15	Cong Food Svc Supplies	per meal \$													
16	HDM Food Svc Supplies	per meal \$													
17	Catered Meals	per meal \$ 2.93	\$506,410	\$141,014	\$647,424	\$506,410	\$141,014	\$647,424	\$506,410	\$141,014	\$647,424	\$1,519,230	\$423,042	\$1,942,272	
18	CONSULTANT/SUBCONTRACTOR Descriptive Title														
19	Registered Dietitian														
20															
21	OTHER COSTS:														
22	Insurance		\$3,948	\$1,099	\$5,047	\$3,948	\$1,099	\$5,047	\$2,967	\$826	\$3,793	\$11,844	\$8,901	\$2,478	
23	Staff Training & Travel		\$2,967	\$826	\$3,793	\$2,967	\$826	\$3,793	\$1,998	\$556	\$2,554	\$3,994	\$25,134	\$116,416	
24	Rental of Equipment		\$1,998	\$556	\$2,554	\$1,998	\$556	\$2,554	\$38,472	\$8,378	\$46,850	\$41,130	\$11,454	\$58,284	
25	Small equipment & Supplies		\$30,094	\$8,378	\$38,472	\$30,094	\$8,378	\$38,472	\$13,710	\$3,818	\$17,528				
26	Delivery Cost		\$13,710	\$3,818	\$17,528										
27	Kitchen Costs														
28	Fees, dues, advertising														
29	Outside Services														
30	Grant, Volunteer and Client Costs														
31	Other Operating														
32	Fundraising														
33	TOTAL DAAS OPERATING EXPENSE		\$370,597	\$158,885	\$729,482	\$370,597	\$158,885	\$729,482	\$370,597	\$158,885	\$729,482	\$1,711,791	\$476,555	\$2,188,446	
35	Non-DAAS				TOTAL			TOTAL			TOTAL			TOTAL	
36	Expenditure Category														
37	Rental of Property														
38	Utilities(Elec, Water, Gas, Phone, Scavenger)														
39	Office Supplies, Postage														
40	Building Maintenance Supplies and Repair														
41	FOOD COSTS	per meal \$													
42	Raw Food	per meal \$													
43	Cong Food Svc Supplies	per meal \$													
44	HDM Food Svc Supplies	per meal \$													
45	Catered Meals	per meal \$ 2.93													
46	CONSULTANT/SUBCONTRACTOR Descriptive Title														
47	Registered Dietitian														
48															
49	OTHER COSTS:														
50	Insurance														
51	Staff Training & Travel														
52	Rental of Equipment														
53	Small equipment & Supplies														
54	Delivery Cost														
55	Kitchen Costs		\$1,948	\$542	\$2,490	\$1,948	\$542	\$2,490	\$2,115	\$726	\$2,841	\$5,844	\$1,626	\$7,470	
56	Fees, dues, advertising		\$2,115	\$589	\$2,704	\$2,115	\$589	\$2,704	\$9,315	\$2,029	\$11,344	\$8,087	\$3,259	\$14,343	
57	Outside Services		\$9,315	\$2,029	\$11,344	\$9,315	\$2,029	\$11,344	\$19,111	\$5,322	\$24,433	\$15,986	\$73,299	\$89,285	
58	Grant, Volunteer and Client Costs		\$19,111	\$5,322	\$24,433	\$19,111	\$5,322	\$24,433	\$6,155	\$1,714	\$7,869	\$18,465	\$5,142	\$23,607	
59	Other Operating		\$6,155	\$1,714	\$7,869	\$6,155	\$1,714	\$7,869	\$42,696	\$42,696	\$85,392	\$128,088	\$598,078	\$683,470	
60	Fundraising		\$153,330	\$42,696	\$196,026	\$153,330	\$42,696	\$196,026	\$189,945	\$242,837	\$432,782	\$569,835	\$158,676.00	\$728,511	
62	TOTAL Non-DAAS OPERATING EXPENSE		\$189,945	\$242,837	\$432,782	\$189,945	\$242,837	\$432,782	\$189,945	\$242,837	\$432,782	\$1,128,088	\$365,331	\$1,493,419	
63															
64	TOTAL DAAS & Non-DAAS OPERATING EXPENSE		\$760,542	\$211,777	\$972,319	\$760,542	\$211,777	\$972,319	\$760,542	\$211,777	\$972,319	\$2,281,626	\$665,331	\$2,946,957	

**Appendix A4 – Services to be Provided  
Self-Help for the Elderly  
Home-Delivered Meals for Adults with Disabilities (HDM-AWD)  
Effective July 1, 2017-June 30, 2020**

**I. Purpose**

The purpose of this grant is to assist adults with disabilities living in San Francisco and identified by Grantee as its target population to live independently, by promoting better health through improved nutrition, and reduced isolation through accessible and appropriate meals services.

**II. Definitions-**

Grantee	Self-Help for the Elderly
ADL	Activities of Daily Living: the basic tasks of everyday life including eating, bathing, dressing, toileting, and transferring (i.e., getting in and out of a bed or chair).
AWD	Adults with Disabilities are adults age 18-59 with disability.
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
CRFC	California Retail Food Code establishes uniform health and sanitation standards for retail food facilities for regulation by the State Department of Public Health, and requires local health agencies to enforce these provisions.
DAAS	Department of Aging and Adult Services
Disability	<p>A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.</p> <p><i>Physical disability or mobile limitation</i> includes wheelchair users, cane or walker users, limited reach ranges, limited hand movement, etc. <i>Chronic illness</i> includes HIV, lung disorders, heart disease/stroke, immune system disorders, diabetes, neurological disorders, etc. <i>Sensory disability</i> includes deaf, hard of hearing, blind, low vision, Aphasia, stuttering, etc. <i>Mental disability</i> includes psychiatric disabilities, depression, anxiety, obsessive-compulsive disorder, phobias, schizophrenia, bi-polar disorder, borderline personality disorder, etc. <i>Cognitive disability</i> includes Down’s syndrome, traumatic brain injury, learning disabilities, etc.</p>

Frail	A functionally impaired individual who is either: (a) unable to perform at least two ADL (Activities of Daily Living), including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, or IADL (Instrumental Activities of Daily Living) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) having a cognitive or other mental impairment that requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
HSA	Human Services Agency of the City and County of San Francisco
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
Home-Delivered Meals (HDM)	Home-delivered meals are provided to consumers who are frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals. HDM programs consist of the procurement, preparation, service and delivery of meals, as well as nutrition education and nutrition counseling. This service requires an annual comprehensive assessment and quarterly re-evaluation of the HDM consumer. The HDM consumer must also have a home visit reassessment by their service providers at least every other quarter. Home Delivered Meals are provided to consumers who have substantial mental and/or physical impairments and lack a support network or resources that result in no safe, healthy alternative for meals. HDM programs consist of the procurement, preparation, service and delivery of meals, as well as nutrition education and counseling. This service requires quarterly reevaluation of the HDM consumer by the grantee and an annual comprehensive assessment by aDAAS approved service provider.
IADL	Instrumental Activities of Daily Living: activities related to independent living and include preparing meals, managing money, shopping for groceries or personal items, performing light or heavy housework, and using a telephone
Low-Income	200% of poverty level. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the Dietary Reference Intakes (DRI) (c) At a minimum, values must be determined for calories, protein, fat, saturated fat, fiber, calcium, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, and vitamin B12.
Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans (DGA), published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the grantee provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the grantee provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Nutrition Counseling	Provision of medical nutrition therapy counseling and referral to other appropriate service to consumers who are receiving special diets, or who are screened to be at high nutrition risk by DETERMINE Your Nutritional Health tool. This service is provided by a Registered Dietitian.
Nutrition Education	The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, and materials. The nutrition education for the HDM consumer may be written nutrition education material in a variety of forms, including but not limited to information sheets, brochures, and booklets. The nutrition education provided shall be based on the needs of the consumers as determined by annual the consumer satisfaction survey and/or results from DETERMINE Your Nutritional Health tool. Nutrition education shall be provided on a quarterly basis and documented. One set of materials is defined as one nutrition education unit provided to one consumer.
OOA	Office on the Aging
Registered Dietitian (RD) – Registered Dietitian Nutritionist (RDN)	Registered Dietitian or Registered Dietitian Nutritionist. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration. A Registered Dietitian (R.D.) shall be covered by professional liability insurance either individually (if a consultant) or through Grantee.
SOGI	Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9</i> ).

**III. Target Population**

The target population is residents of San Francisco County, between the age of 18-59 who have a disability as defined in Section II, Definitions. OOA targets individuals who have the greatest economic and social need such as living on low-income, are minorities, possessing non- or limited-English skills, or are lesbian/gay/bisexual/transgender.

**IV. Eligibility for Services**

To participate in Home-Delivered Meals, the consumer must meet the following criteria: A consumer, between the age of 18-59 who has *substantial* mental and/or physical impairments and lack a support network or resources that result in no safe, healthy alternative for meals. Substantial impairments include one or more of the following:

- Self-Care: ADL and IADL, especially grocery shopping and meal preparation and that the consumer lacks the ability to obtain safe, healthy meals.
- Capacity for independent living and self-direction
- Cognitive functioning and emotional adjustment

**V. Services to be Provided**

A. Develop and maintain HDM program policies and procedures that are in compliance with and meet the nutrition and food service standards set forth by the most recent California Retail Food Code and OOA Policies and include nutrition education for HDM consumers. Policy and procedures shall ensure the provision of quality meals, adequate access to sound nutrition information enabling consumers to reduce incidence of chronic diseases and maintain independent living.

B. Provide home-delivered meal services, which include:

1. Enroll the number of unduplicated consumers annually as indicated in Table A, and in the various neighborhood and/or districts as indicated in the DAAS-OOA approved Site Chart.
2. Provide the total number of AWD meals annually as indicated in Table A. The meals will be delivered to neighborhoods and/or districts as indicated on the DAAS-OOA approved Site Chart. Each meal shall meet the OOA menu requirements. Meals offered may be hot, chilled or frozen, regular or modified meals as approved by DAAS-OOA, and as determined appropriate for the population served.
3. Documenting, tracking and reporting consumers' condition changes to citywide HDM Assessment contractor that would affect the consumer's eligibility to continue receiving HDM services.
4. Meet with the citywide HDM-AWD assessment contractor at least on a quarterly basis to review services, utilization, and condition change documentation.. Grantee must also establish a policy & procedure to communicate with the HDM-AWD assessment provider, as needed, to discuss any issues that may arise pertaining to the HDM-AWD consumer or the service provided.
5. Provide at least one set of nutrition education material to consumers on a quarterly basis. The total units of nutrition education will be as indicated on the OOA approved Site Chart. The service units will be reported in CA-GetCare in the month that the service is provided.
6. A suggested donation per meal requested of each participant must be approved by the Grantee's Board of Directors and OOA in advance.
7. Service units:

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	125	125	125	375
#Meals	40,169	40,169	40,169	120,507

- C. Ensure central kitchen (or caterer kitchen) and the home-delivered meal routes meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and

documented by a R.D. based on the number of monitoring approved in the Grantee's budget. Grantee with four or more delivery routes will conduct a HDM route monitoring at least once a month. In-service training to address any monitoring findings and/or to reinforce best practices will be scheduled and conducted in a timely manner to bring the program into compliance. The HACCP monitoring reports for the production kitchen and HDM routes shall be sent to OOA on a timely basis and no later than once per quarter.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist as defined by OOA policy memoranda. The survey tool will be provided by OOA.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the quarterly in-service training coordinated and provided by the OOA, and share the information with their staff and volunteers.
- J. The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.
- L. Grantee will develop and provide each consumer with a welcome packet that includes at minimum, the following information: the agency's meal delivery schedule, sample menu, donation policy and collection procedures, procedures to change meal delivery request, grievance policy, and how to request assistance, if needed.

#### **VI. Service Objectives**

- A. Grantee will serve the total number of unduplicated consumers as indicated in Table A in Section V.
- B. Grantee will provide the total number of meals as indicated in Table A, Section V.

#### **VII. Outcome Objectives**

- A. At least 85% of consumers will report being satisfied with the meal quality as defined as "Excellent or Good" in the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee's average number of meals served at each congregate meal site.
- B. At least 75% of the consumers will report that the meal service helps maintain their independence based on the DAAS annual consumer satisfaction survey, with a minimum sample size of the Grantee's average number of meals served daily.
- C. At least 65% of consumers will report an increase in the consumption of fruits and vegetables as evidenced by a reported change from previous baseline data in the Nutrition Risk Screening Tool or other appropriate evaluation data.
- D. At least 65% of consumers with a high nutrition risk score as defined by the "Determine Your Nutritional Health" checklist will be connected to additional and appropriate resources.

- E. At least 65% of consumers that are identified as "lonely" as evidenced by the DAAS adopted loneliness screening tool will be connected to additional and appropriate resources.

### **VIII. Monitoring Activities**

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and HDM routes in accordance with CRFC and DAAS policies and nutrition standards. This includes project income policies, nutrition education policies, consumer eligibility and targeted mandates, documentation of the units of service and all reporting, and progress of service and outcome objectives; how consumer records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to the nutrition program operation, current organizational chart in the nutrition service department, grievance policies and procedures, verification that hours of operation are reflected in most recent approved site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

### **IX. Reporting Requirements**

- A. Grantee will enter into CA-GetCare any updates in the consumer's demographic data obtained from consumers when conducting a quarterly assessment or any other time a consumer may provide new information.
- B. Grantee will enter into CA-GetCare all the consumer level service units in the Service Recording Tool and data for monthly service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI, Service Objectives.
- D. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of meals served and number of nutrition compliance units provided.
- E. Grantee will enter the annual Outcome Objective metrics identified in Section VII of this appendix A in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 (or as amended) each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- G. Grantee will develop and maintain its OOA approved Site Chart. The site chart may be updated with the approval of OOA. A copy of the updated Site Chart will be kept in OOA's contractor program.

- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- I. Grantee will provide other reports as requested. Apart from the on-line reporting via Ca-GetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Tahir Shikh  
Contract Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120  
[Tahir.Shikh@sfgov.org](mailto:Tahir.Shikh@sfgov.org)

Linda Lau  
Lead Nutritionist/OOA  
1650 Mission Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103  
[Linda.Lau@sfgov.org](mailto:Linda.Lau@sfgov.org)



	A	B	C	D	E	F	G	H	I	J	K	L
1	BUDGET FORMS											Appendix B7, pg 1
2												9/13/2017
3	Document Date:											
4	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>											
5	<b>BUDGET PROPOSAL FORMS</b>											
6	Grantee's Name: SELF-HELP FOR THE ELDERLY											Grant Term
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/> 2											7/1/17 to 6/30/20
8	Effective Date of Mod: No. of Mod:											
9	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)											Average cost/meal
10	HDM-AWD	Add Back	Revised Budget	HDM-AWD	Add Back	Revised Budget	HDM-AWD	Add Back	Revised Budget	TOTAL		
11	30,178	9,991	40,169	30,178	9,991	40,169	30,178	9,991	40,169	120,507		
12	Annual #Meals Contracted											
13	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/18 to 6/30/19	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/19 to 6/30/20	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
14	DAAS Expenditures											
15	Salaries & Benefits	\$107,487	\$28,869	\$136,356	\$107,487	\$28,869	\$136,356	\$107,487	\$28,869	\$136,356	\$409,068	\$3.39
16	Operating Expense	\$65,623	\$27,780	\$93,403	\$65,623	\$27,780	\$93,403	\$65,623	\$27,780	\$93,403	\$280,209	\$2.33
17	Subtotal	\$173,110	\$56,649	\$229,759	\$173,110	\$56,649	\$229,759	\$173,110	\$56,649	\$229,759	\$689,277	\$5.72
18	Indirect Percentage (max 10%)	10%			10%			10%				
19	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)	\$17,311	\$6,294	\$23,605	\$17,311	\$6,294	\$23,605	\$17,311	\$6,294	\$23,605	\$70,815	\$0.59
20	Capital Expenditure											
21	TOTAL DAAS EXPENDITURES	\$190,421	\$62,943	\$253,364	\$190,421	\$62,943	\$253,364	\$190,421	\$62,943	\$253,364	\$760,092	\$6.31
22	Non-DAAS Expenditures											
23	Salaries & Benefits											
24	Operating Expense	\$54,198	\$13,807	\$68,005	\$54,198	\$13,807	\$68,005	\$54,198	\$13,807	\$68,005	\$204,014	\$1.69
25	Capital Expenditure											
26	TOTAL Non-DAAS EXPENDITURES	\$54,198		\$68,005	\$54,198		\$68,005	\$54,198		\$68,005	\$204,014	\$1.69
27	TOTAL DAAS & Non-DAAS EXPENDITURES	\$244,619		\$321,369	\$244,619		\$321,369	\$244,619		\$321,369	\$964,106	\$8.00
28	HSA-DAAS Revenues											
29	Meals	\$190,421	\$62,943	\$253,364	\$190,421	\$62,943	\$253,364	\$190,421	\$62,943	\$253,364	\$760,092	
30	Nutrition Compliance (if your agency is requesting funds)											
31												
32												
33												
34	TOTAL HSA-DAAS REVENUES	\$190,421	\$62,943	\$253,364	\$190,421	\$62,943	\$253,364	\$190,421	\$62,943	\$253,364	\$760,092	
35	PER MEAL COST, HSA-DAAS	\$6.31	\$6.30	\$6.31	\$6.31	\$6.30	\$6.31	\$6.31	\$6.30	\$6.31	\$6.31	
36	Per MEAL & COMPLIANCE COST	\$6.31	\$6.30	\$6.31	\$6.31	\$6.30	\$6.31	\$6.31	\$6.30	\$6.31	\$6.31	
37	Non-DAAS Revenues											
38	Project Income	4,842		4,842	4,842		4,842	4,842		4,842	\$14,527	\$0.12
39	Agency Cash - Fundraising	\$49,356	\$13,807	63,162	\$49,356	\$13,807	63,162	\$49,356	\$13,807	63,162	\$189,486	\$1.57
40	Agency In-Kind Volunteer											
41	Nutrition Compliance Revenues											
42												
43	TOTAL NON HSA-DAAS REVENUES	\$54,198	\$13,807	\$68,005	\$54,198	\$13,807	\$68,005	\$54,198	\$13,807	\$68,005	\$204,014	
44	PER MEAL COST, NON HSA-DAAS	\$1.80	\$1.38	\$1.69	\$1.80	\$1.38	\$1.69	\$1.80	\$1.38	\$1.69	\$1.69	
45	TOTAL REVENUES	\$244,619	\$76,750	\$321,369	\$244,619	\$76,750	\$321,369	\$244,619	\$76,750	\$321,369	\$964,106	
46	PER MEAL COST, TOTAL	\$8.11	\$7.68	\$8.00	\$8.11	\$7.68	\$8.00	\$8.11	\$7.68	\$8.00	\$8.00	
47	Full Time Equivalent (FTE)											
48	Prepared by: Leny Nair	Phone No.: 415-677-7682						Date: 9/13/17				
49	HSA-CO Review Signature:							Date:				
50	HSA #1	Form Rev. 12/22/19										

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	Grantee's Name: SELF-HELP FOR THE ELDERLY												Appendix B7, page 2				
2	Program Name: HDM-AWD												Date: 9/13/17				
3	<b>Salaries &amp; Benefits Detail</b>															<b>TOTAL</b>	
4																	
5																	
6																	
7																	
8	<b>H.S.A-DAAS</b>																
9	<b>Agency Totals</b>																
10	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Add Back	7/1/17 to 6/30/18	Revised Budgeted Salary	Budgeted Salary	Add Back	7/1/18 to 6/30/19	Revised Budgeted Salary	Budgeted Salary	Add Back	7/1/19 to 6/30/20	Revised Budgeted Salary	Budgeted Salary
11	HDM/Transp. Manager/FW	\$50,000	100%	10%	10%			\$5,000	\$5,000			\$5,000	\$5,000			\$5,000	\$15,000
12	Asst Director/RC	\$67,000	100%	4%	4%			\$2,987	\$2,987			\$2,987	\$2,987			\$2,987	\$8,961
13	HDM Transp Coordinator/SN	\$41,600	100%	65%	65%	\$22,880		\$4,160	\$27,040	\$4,160	\$22,880	\$27,040	\$4,160	\$22,880		\$27,040	\$81,120
14	Transportation Dispatcher/AW	\$42,640	100%	10%	10%			\$4,264	\$4,264			\$4,264	\$4,264			\$4,264	\$12,792
15	Outreach Worker/TC	\$35,484	50%	10%	5%			\$1,773	\$1,773			\$1,773	\$1,773			\$1,773	\$5,320
16	HDM Supervisor/VW	\$34,840	75%	50%	38%			\$13,065	\$13,065			\$13,065	\$13,065			\$13,065	\$39,195
17	HDM Driver/HF	\$31,720	75%	100%	75%			\$23,790	\$23,790			\$23,790	\$23,790			\$23,790	\$71,370
18	HDM Driver/QL	\$30,160	88%	100%	88%			\$26,390	\$26,390			\$26,390	\$26,390			\$26,390	\$79,170
19																	
20																	
21																	
22																	
23																	
24																	
25																	
26																	
27																	
28																	
29																	
30																	
31	TOTALS	\$ 333,424	688%	349%	294%			\$81,429	\$22,880	\$104,309	\$81,429	\$22,880	\$104,309	\$81,429	\$22,880	\$104,309	\$312,927
32																	
33	FRINGE BENEFIT RATE	31%															
34	EMPLOYEE FRINGE BENEFITS	\$ 103,361						\$26,058	\$5,989	\$32,047	\$26,058	\$5,989	\$32,047	\$26,058	\$5,989	\$32,047	\$96,141
35																	
36																	
37	TOTAL DAAS SALARIES & BENEFITS	\$ 436,785						\$107,487	\$28,869	\$136,356	\$107,487	\$28,869	\$136,356	\$107,487	\$28,869	\$136,356	\$409,068
38																	
39																	
40	<b>Non - DAAS</b>																
41	<b>Agency Totals</b>																
42	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Add Back	7/1/17 to 6/30/18	Budgeted Salary	Add Back	7/1/18 to 6/30/19	Budgeted Salary	Add Back	7/1/19 to 6/30/20	Budgeted Salary	Add Back	7/1/20 to 6/30/21	Budgeted Salary
43																	
44																	
45																	
46																	
47																	
48																	
49	TOTAL NON-DAAS	\$ -															
50																	
51	FRINGE BENEFIT RATE	38.2%															
52	EMPLOYEE FRINGE BENEFITS	\$ -															
53																	
54																	
55	TOTAL Non-DAAS SALARIES & BENEFITS	\$ -															
56																	
57	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 436,785						\$107,487	\$28,869	\$136,356	\$107,487	\$28,869	\$136,356	\$107,487	\$28,869	\$136,356	\$409,068
58	HSA #2																

Form Rev. 12/22/16

	A	B	C	D	E	F	G	H	I	J	K	L	M	N		
1	Grantee's Name: SELF-HELP FOF													Appendix B7, page 3		
2	Program Name:													Date:		
3	HDM-AWD													9/13/17		
4	<b>Operating Expense Detail</b>															
7	H.S.A-DAAS	Annual #Meals Contracted:	30,178	9,991	40,169	30,178	9,991	40,169	30,178	9,991	40,169	30,178	9,991	40,169	TOTAL	
8	Expenditure Category	Term:	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/18 to 6/30/19	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/19 to 6/30/20	7/1/19 to 6/30/20	7/1/19 to 6/30/20	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property															
10	Utilities(Elec, Water, Gas, Phone, Scavenger)															
11	Office Supplies, Postage		\$137	\$100	\$237	\$137	\$100	\$237	\$137	\$100	\$237	\$137	\$100	\$237	\$710	
12	Building Maintenance Supplies and Repair															
13	FOOD COSTS															
14	Raw Food	per meal \$														
15	Cong Food Svc Supplies	per meal \$														
16	HDM Food Svc Supplies	per meal														
17	Catered Meals	per meal \$	2.17	\$65,486	\$21,680	\$87,166	\$65,486	\$21,680	\$87,166	\$65,486	\$21,680	\$87,166	\$65,486	\$21,680	\$87,166	\$261,499
18	CONSULTANT/SUBCONTRACTOR Descriptive Title															
19	Registered Dietitian															
20																
21	OTHER COSTS:															
22	Insurance															
23	Staff Training & Travel															
24	Rental of Equipment															
25	Small equipment & Supplies															
26	Auto - Fuel & Insurance			\$6,000	\$6,000		\$6,000	\$6,000		\$6,000	\$6,000		\$6,000	\$6,000	\$18,000	
27	Repair/Maintenance															
28																
29																
30	TOTAL DAAS OPERATING EXPENSE		\$65,623	\$27,780	\$93,403	\$65,623	\$27,780	\$93,403	\$65,623	\$27,780	\$93,403	\$65,623	\$27,780	\$93,403	\$280,209	
32	Non-DAAS														TOTAL	
33	Expenditure Category															
34	Rental of Property															
35	Utilities(Elec, Water, Gas, Phone, Scavenger)															
36	Office Supplies, Postage															
37	Building Maintenance Supplies and Repair															
38	FOOD COSTS															
39	Raw Food	per meal \$	0.42	\$12,732	\$4,215	\$16,947	\$12,732	\$4,215	\$16,947	\$12,732	\$4,215	\$16,947	\$12,732	\$4,215	\$16,947	\$50,842
40	Cong Food Svc Supplies	per meal														
41	HDM Food Svc Supplies	per meal														
42	Catered Meals	per meal \$	0.96	\$28,971	\$9,591	\$38,562	\$28,971	\$9,591	\$38,562	\$28,971	\$9,591	\$38,562	\$28,971	\$9,591	\$38,562	\$115,687
43	CONSULTANT/SUBCONTRACTOR Descriptive Title															
44	Registered Dietitian															
45																
46	OTHER COSTS:															
47	Insurance		\$1,300		\$1,300	\$1,300		\$1,300	\$1,300		\$1,300	\$1,300		\$1,300	\$3,900	
48	Staff Training & Travel															
49	Communications (Phone & Internet)		\$300		\$300	\$300		\$300	\$300		\$300	\$300		\$300	\$900	
50	Rental of Equipment															
51	Small equipment & Supplies															
52	Auto - Fuel & Insurance		\$7,895		\$7,895	\$7,895		\$7,895	\$7,895		\$7,895	\$7,895		\$7,895	\$23,685	
53	Repair/Maintenance-Vehicle		\$3,000		\$3,000	\$3,000		\$3,000	\$3,000		\$3,000	\$3,000		\$3,000	\$9,000	
54	Recruitment															
56	TOTAL Non-DAAS OPERATING EXPENSE		\$54,198	\$13,807	\$68,005	\$54,198	\$13,807	\$68,005	\$54,198	\$13,807	\$68,005	\$54,198	\$13,807	\$68,005	\$204,014	
57																
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE		\$119,821	\$41,587	\$161,408	\$119,821	\$41,587	\$161,408	\$119,821	\$41,587	\$161,408	\$119,821	\$41,587	\$161,408	\$484,223	
63	HSA #3	Form Rev. 12/22/16														