

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

**Elderly Nutrition Program (ENP) Congregate Meals
July 1, 2016 – June 30, 2017**

I. Purpose

The purpose of this grant is to assist older individuals 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
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
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 Adult and Aging Services
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
HSA	Human Services Agency of the City and County of San Francisco
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.

Nutrition Education

The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education services shall be provided by a dietitian or by personnel trained or approved by the dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a qualified dietitian. Coordination with community resource is encouraged. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. The nutrition education activities shall be provided on quarterly basis and documented. One unit is defined as one nutrition education presentation provided to one participant.

OOA

Office on the 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.

Low-Income

100% 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.

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.

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.

Title 22 Regulations

Refers to Barclay's official California Cod 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.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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 Meals, an individual must meet either one of the following criteria:

- A senior, age 60 or above
- Spouse or domestic partner of a senior
- A person under age 60, with a disability who resides in housing facilities occupied primarily by older adults at which congregate nutrition services are provided
- A disabled individual who resides at home with and accompanies a senior who participates in the program
- A volunteer under age 60 who helps in the program may be offered a meal if doing so will not deprive a senior of a meal

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants 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 CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- 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 at least three times a year by a RD. The HACCP monitoring must be conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. 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.

- 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 by April 30 of each funding year. 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 either 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 mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to 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.
www.aging.ca.gov/Resources/Docs/SecurityAwarenessTrng.pps

VI. Service Objectives

- A. Grantee will serve the total of 3,483 unduplicated consumers (148 breakfast and 3,335 lunch/dinner).
- B. Grantee will serve the total number of 242,493 authorized meals (43,810 breakfast and 198,683 lunch/dinner).
- C. Grantee will provide the total number of nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
- B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
- C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
- D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they learned to make healthier food choices and/or learn to improve safe food handling practices.
- E. To provide access to socialization activities. At least 75% of the participants report increased access to socialization activities and interactions with others.

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.

- E. 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.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.
- G. Grantee will provide other reports as requested.
- H. 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:

Justin Chan
Senior Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Justin.Chan@sfgov.org

Tiffany Kearney, RD
Nutritionist/OOA
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Tiffany.Kearney@sfgov.org

	A	B	C	D	E
1	BUDGET FORMS				Appendix B, pg. 1 5/25/2016
2	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
3					
4					
5	Project Open Hand			Grant Term	
6					Average cost/meal
7	Program: Cong-ENP, HDM-ENP, Cong- AWD, HDM-AWD	Cong-ENP		TOTAL	
8	Annual #Meals Contracted	198,683		198,683	
9	Program Term	7/1/16-6/30/17		7/1/16-6/30/17	
10	DAAS Expenditures				
11	Salaries & Benefits	\$890,552		\$890,552	\$4.48
12	Operating Expense	\$359,164		\$359,164	\$1.81
13	Subtotal	\$1,249,716		\$1,249,716	\$6.29
14	Indirect Percentage (%)	0%		0%	
15	Indirect Cost (Line 14 X Line 13)	\$0		\$0	\$0.00
16	Capital Expenditure	\$0		\$0	\$0.00
17	TOTAL DAAS EXPENDITURES	\$1,249,716		\$1,249,716	\$6.29
18					
19	Non-DAAS Expenditures				
20	Salaries & Benefits	\$777,589		\$777,589	\$3.91
21	Operating Expense	\$118,501		\$118,501	\$0.60
22	Subtotal	\$896,090		\$896,090	\$4.51
23	Indirect Percentage (%)	0%		0%	
24	Indirect Cost (Line 23 X Line 22)	\$0		\$0	\$0.00
25	Capital Expenditure	\$0		\$0	\$0.00
26	TOTAL NON-DAAS EXPENDITURES	\$896,090		\$896,090	\$4.51
27					
28	HSA-DAAS Revenues				
29	Meals Funding	\$1,249,716		\$1,249,716	
30					
31					
32					
33					
34	TOTAL HSA-DAAS REVENUES	\$1,249,716		\$1,249,716	
35	Per MEAL COST, HSA-DAAS	\$6.29		\$6.29	
36	Non-DAAS Revenues				
37	Project Income	\$143,052		\$143,052	\$0.72
38	Agency Cash - Fundraising	\$44,298		\$44,298	\$0.22
39	Agency In-Kind Volunteer	\$708,740		\$708,740	\$3.57
40					
41					
42					
43	TOTAL NON HSA-DAAS REVENUES	\$896,090		\$896,090	
44	PER MEAL COST, NON HSA-DAAS	\$ 4.51		\$4.51	\$4.51
45	TOTAL DAAS & NON-DAAS REVENUES	\$2,145,806		\$2,145,806	
46	PER MEAL COST, TOTAL	\$10.80		\$10.80	
47	Full Time Equivalent (FTE)				
48					
49	Prepared by: Victor de la Rocha	Phone No.:		Date:	
50	HSA-CO Review Signature:				
51	HSA #1 (10/20/15)				

	A	B	C	D	E	F	G	H
1	Project Open Hand							Appendix B, page 2
2	Program Name:							Date: 5/25/16
3	Cong-ENP							
4								
5								
6								
7		Salaries & Benefits Detail						
8	POSITION TITLE and NAME	Agency Totals	For DAAS Nutrition		7/1/16-6/30/17			TOTAL
9		Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		Total
9	Director -- N. Lopez	\$105,000	100%	45%	35%	\$36,855		\$36,855
10	Sites Manager -- A. Mekler	\$60,000	100%	100%	78%	\$46,800		\$46,800
11	Sites Manager -- J. Nagel	\$60,000	100%	100%	78%	\$46,800		\$46,800
12	Admin.Asst. -- M.Aguilar	\$35,360	100%	100%	78%	\$27,581		\$27,581
13	Site Coordinators - 25 pp.	\$330,460	100%	100%	78%	\$257,759		\$257,759
14	Cook - R. Santa Ana	\$31,055	100%	38%	30%	\$9,205		\$9,205
15	Cook - S. Gilmore	\$45,000	100%	53%	41%	\$18,603		\$18,603
16	Cook - J. Pensabene	\$26,520	100%	38%	30%	\$8,024		\$8,024
17	Cook - Open	\$29,120	100%	38%	30%	\$8,631		\$8,631
18	Swing Cook - M. Gillet	\$31,200	100%	38%	30%	\$9,248		\$9,248
19	Swing Cook - Open	\$31,200	100%	38%	30%	\$9,248		\$9,248
20	Swing Cook - Open	\$31,200	100%	38%	30%	\$9,248		\$9,248
21	Porter - L. Barrera	\$24,960	100%	38%	30%	\$8,024		\$8,024
22	Porter - F. Guinto	\$26,520	100%	38%	30%	\$8,024		\$8,024
23	Porter - R. Guinto	\$25,480	100%	38%	30%	\$8,024		\$8,024
24	Porter - J. Navas	\$24,336	100%	38%	30%	\$8,024		\$8,024
25	Porter - G. Pryor	\$26,000	100%	38%	30%	\$8,024		\$8,024
26	Porter - R. Quan	\$26,832	100%	38%	30%	\$8,024		\$8,024
27	Porter - F. Viray	\$25,480	100%	38%	30%	\$8,024		\$8,024
28	Operations Clerk - C. Lopez	\$30,576	100%	40%	31%	\$9,540		\$9,540
29	Driver - O. Baltodano	\$27,040	100%	50%	39%	\$10,546		\$10,546
30	Driver - A.Kessel	\$27,040	100%	50%	39%	\$10,546		\$10,546
31	Volunteer Coord. - Open	\$45,000	100%	100%	78%	\$35,100		\$35,100
32	Volunteer Mgr. - S. Rosas	\$60,000	100%	45%	35%	\$21,060		\$21,060
33	Purchasing Mgr - C. Miles	\$60,000	100%	40%	31%	\$18,720		\$18,720
34	Distribution Mgr. - S. Yowell	\$50,000	100%	50%	39%	\$19,500		\$19,500
35	Staff Accountant - K. Pat Ryan	\$41,600	100%	45%	35%	\$14,602		\$14,602
36	TOTALS	\$ 1,336,979	2700%	1367%	1066%	\$683,777		\$683,777
37								
38	FRINGE BENEFIT RATE	30.24%						
39	EMPLOYEE FRINGE BENEFITS	\$ 404,302				\$206,775		\$206,775
40								
41	TOTAL DAAS SALARIES & BENEFITS	\$ 1,741,281				\$890,552		\$890,552
42								
43	Non - DAAS	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	Budgeted Salary		Total
45	Cook - L. Walker	\$ 40,560	100%	53%	53%	\$21,497		\$21,497
46	Logistics Coord. - K. Dennis	\$ 29,120	100%	22%	22%	\$6,406		\$6,406
47	Warehouse Asst. - M. Armour	\$ 28,600	100%	40%	40%	\$11,440		\$11,440
48	Driver - J. Vilchez	\$ 27,040	100%	50%	50%	\$13,520		\$13,520
49	Volunteers	\$ 27,040	100%	2013%	2013%	\$544,180		\$544,180
50								
51	TOTAL NON-DAAS	\$ 152,360	500%	2178%	2178%	\$ 597,043		\$597,043
52								
53	FRINGE BENEFIT RATE	30.24%						
54	EMPLOYEE FRINGE BENEFITS	\$ 46,074				\$180,546		\$180,546
55								
56								
57	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 198,434				\$777,589		\$777,589
58								
59	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 1,939,715				\$ 1,668,141		\$1,668,141
60								

	A	B	C	D	E	F	G	H	I
1	Project Open Hand								
2	Program Name:								5/25/16
3	Cong-ENP								
4									
5									
6				Annual #Meals Contracted:	198,683				TOTAL
7	Expenditure Category			Term:	6/30/17				Total
8	Rental of Property								
9	Utilities(Elec, Water, Gas, Phone, Scavenger)								
10	Office Supplies, Postage								
11	Building Maintenance Supplies and Repair								
12	FOOD COSTS								
13	Raw Food	per meal	\$ 1.57		\$311,008				\$311,008
14	Cong Food Svc Supplie:	per meal	\$ 0.24		\$48,156				\$48,156
15	Catered Meals	per meal							
16	CONSULTANT/SUBCONTRACTOR	Descriptive Title							
17									
18									
19	OTHER COSTS:								
20	Insurance								
21	Staff Training & Travel								
22	Rental of Equipment								
23	Small Equipment (over \$500 but under \$5,000/item)								
24	Auto - Fuel & Insurance								
25	Repair/Maintenance								
26									
27									
28	TOTAL DAAS OPERATING EXPENSE				\$359,164				\$359,164
29									
30	Non-DAAS								TOTAL
31	Expenditure Category			Program					
32	Rental of Property								
33	Utilities(Elec, Water, Gas, Phone, Scavenger)								
34	Office Supplies, Postage								
35	Building Maintenance Supplies and Repair								
36	FOOD COSTS								
37	Raw Food	per meal	\$ 0.59		\$117,096				\$117,096
38	Cong Food Svc Supplie:	per meal	\$ 0.01		\$1,405				\$1,405
39	HDM Food Svc Supplie:	per meal							
40	Catered Meals	per meal							
41	CONSULTANT/SUBCONTRACTOR	Descriptive Title							
42	Registered Dietitian								
43									
44	OTHER COSTS:								
45	Insurance								
46	Staff Training & Travel								
47	Rental of Equipment								
48	Small Equipment (over \$500 but under \$5,000/item)								
49	Auto - Fuel & Insurance								
50	Repair/Maintenance								
51									
52									
53									
54	TOTAL Non-DAAS OPERATING EXPENSE				\$118,501				\$118,501
55									
56	TOTAL DAAS & Non-DAAS OPERATING EXPENSE				\$477,665				\$477,665
57									

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM

	FY16-17	FY16-17	HSA-DAAS	Non-H.S.A
	32	\$50.00	\$ 50.00	\$0.00

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

3

\$600.00

\$ 600.00

\$0.00

Site/Route Monitoring (1 unit = 1 session completed):

56

\$250.00

\$ 250.00

\$0.00

Menu Planning & Analysis (1 unit = 1 set menu completed)

4

\$700.00

\$ 700.00

\$0.00

HDM Assessment (1 units = annual intake assessment & reassessment completed)

0

OTHER Nutrition Compliance:

In-service training to staff/volunteers (1 unit =1 hour)

0

Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)

1

0

0

0

1	0	0	0
0			
1			

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:

	A	B	C	D	E
1	Appendix Ba, Page 1				
2	Document Date:				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Contractor Name			Term	
6				July 1, 2016 to June 30, 2017	
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate		REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits	\$1,600	\$1,600	\$0	\$1,600
15	Operating Expense	\$0	\$0	\$0	\$0
16	Subtotal Direct	\$1,600	\$1,600	\$0	\$1,600
17	Indirect Percentage				
18	Indirect Expense	\$0	\$0	\$0	\$0
19	Total Nutrition Education	\$1,600	\$1,600	\$0	\$1,600
20	Nutrition Counseling				
21	Salaries & Benefits	\$0	\$0	\$0	\$0
22	Operating Expense	\$0	\$0	\$0	\$0
23	Subtotal Direct	\$0	\$0	\$0	\$0
24	Indirect Percentage				
25	Indirect Expense	\$0	\$0	\$0	\$0
26	Total Nutrition Counseling	\$0	\$0	\$0	\$0
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits	\$1,800	\$1,800	\$0	\$1,800
29	Operating Expense	\$0	\$0	\$0	\$0
30	Subtotal Direct	\$1,800	\$1,800	\$0	\$1,800
31	Indirect Percentage				
32	Indirect Expense	\$0	\$0	\$0	\$0
33	Total HCCP Kitchen Monitoring	\$1,800	\$1,800	\$0	\$1,800
34	Site/Route Monitoring				
35	Salaries & Benefits	\$14,000	\$14,000	\$0	\$14,000
36	Operating Expense	\$0	\$0	\$0	\$0
37	Subtotal Direct	\$14,000	\$14,000	\$0	\$14,000
38	Indirect Percentage				
39	Indirect Expense	\$0	\$0	\$0	\$0
40	Total Site/Route Monitoring	\$14,000	\$14,000	\$0	\$14,000
41	Menu Planning				
42	Salaries & Benefits	\$2,800	\$2,800	\$0	\$2,800
43	Operating Expense	\$0	\$0	\$0	\$0
44	Subtotal Direct	\$2,800	\$2,800	\$0	\$2,800
45	Indirect Percentage				
46	Indirect Expense	\$0	\$0	\$0	\$0
47	Total Menu Planning	\$2,800	\$2,800	\$0	\$2,800
48	HDM Assessments				
49	Salaries & Benefits	\$0	\$0	\$0	\$0
50	Operating Expense	\$0	\$0	\$0	\$0
51	Subtotal Direct	\$0	\$0	\$0	\$0
52	Indirect Percentage				
53	Indirect Expense	\$0	\$0	\$0	\$0
54	Total HDM Assessments	\$0	\$0	\$0	\$0
55	Other Nutrition Compliance				
56	Salaries & Benefits	\$0	\$0	\$0	\$0
57	Operating Expense	\$0	\$0	\$0	\$0
58	Subtotal Direct	\$0	\$0	\$0	\$0
59	Indirect Percentage				
60	Indirect Expense	\$0	\$0	\$0	\$0
61	Total Other Nutrition Compliance	\$0	\$0	\$0	\$0
62	GRAND Total Expenditures	\$20,200	\$20,200	\$0	\$20,200
63	HSA Revenues				
64	DAAS Revenues	\$20,200	\$20,200		
65					
66	TOTAL HSA REVENUES	\$20,200	\$20,200		\$20,200
67	Other Non-H.S.A.-DAAS Revenues				
68					
69					
70					
71	TOTAL OTHER REVENUES				
72	Full Time Equivalent (FTE)				
74	Prepared by:	Telephone No.:		Date	
75	HSA-CO Review Signature: _____				
76	HSA #1 5/19/2016				

Program Name:
(Same as Line 9 on HSA #1)

Site/Route & Kitchen Monitoring Salaries & Benefits Detail

	A	B	C	D	E	F	G	H	I			
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
						7/1/16-6/30/17	1/0/00	1/0/00				
						Agency Totals:	For HSA Program:	For HSA Program	REVENUE Cost Allocation:	Total Revenue		
						Annual Full Time Salary for FTE	Total % FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
12						POSITION TITLE						
13						Dietitian -- K. Friesen	\$49,920	100%	22%	\$10,769	\$10,769	\$10,769
14												
15												
16												
17												
18												
19												
20												
21												
22												
23												
24						TOTALS	\$49,920	1.00	0.22	\$10,769	\$10,769	\$10,769
25												
26						FRINGE BENEFIT RATE	30%					
27						EMPLOYEE FRINGE BENEFITS	\$15,096			\$3,231	\$3,231	\$3,231
28												
29												
30						TOTAL SALARIES & BENEFITS	\$65,016			\$14,000	\$14,000	\$14,000
31						HSA #2						5/19/2016

Program Name:
 (Same as Line 9 on HSA #1)

Menu Planning Salaries & Benefits Detail

POSITION TITLE	Agency Totals		For HSA Program		7/1/16-6/30/17	1/0/00	1/0/00	Total Revenue
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	For HSA Program Budgeted Salary	REVENUE Cost Allocation: H.S.A.-DAAS Non-HSA-DAAS		
Dietitian – K. Friesen	\$49,920	100%	4%	4%	\$2,154	\$2,154		\$2,154
TOTALS	\$49,920	1.00	0.04	0.04	\$2,154	\$2,154		\$2,154
FRINGE BENEFIT RATE	30%							
EMPLOYEE FRINGE BENEFITS	\$15,096				\$646	\$646		\$646
TOTAL SALARIES & BENEFITS	\$65,016				\$2,800	\$2,800		\$2,800
HSA #2								5/19/2016

	A	B	C	D	E
1	BUDGET FORMS			Appendix B-1, pg. 1	
2				5/25/2016	
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
5	Project Open Hand			Grant Term	
6					
7	Program: Cong-ENP, HDM-ENP, Cong- AWD, HDM-AWD	Cong-ENP Breakfast		TOTAL	Average cost/meal
8	Annual #Meals Contracted	43,810		43,810	
9	Program Term	Year 1		Total	
10	DAAS Expenditures				
11	Salaries & Benefits	\$141,613		\$141,613	\$3.23
12	Operating Expense	\$0		\$0	\$0.00
13	Subtotal	\$141,613		\$141,613	\$3.23
14	Indirect Percentage (%)	0%		0%	
15	Indirect Cost (Line 14 X Line 13)	\$0		\$0	\$0.00
16	Capital Expenditure	\$0		\$0	\$0.00
17	TOTAL EXPENDITURES	\$141,613		\$141,613	\$3.23
18					
19	Non-DAAS Expenditures				
20	Salaries & Benefits	\$68,614		\$68,614	\$1.57
21	Operating Expense	\$105,581		\$105,581	\$2.41
22	Subtotal	\$174,195		\$174,195	\$3.98
23	Indirect Percentage (%)	0%		0%	
24	Indirect Cost (Line 23 X Line 22)	\$0		\$0	\$0.00
25	Capital Expenditure	\$0		\$0	\$0.00
26	TOTAL NON-DAAS EXPENDITURES	\$174,195		\$174,195	\$3.98
27					
28	HSA-DAAS Revenues				
29	Meals Funding	\$141,613		\$141,613	
30					
31					
32					
33					
34	TOTAL HSA-DAAS REVENUES	\$141,613		\$141,613	
35	Per MEAL COST, HSA-DAAS	\$3.23		\$3.23	
36	Non-DAAS Revenues				
37	Project Income	35,048		\$35,048	\$0.80
38	Agency Cash - Fundraising	\$70,533		\$70,533	\$1.61
39	Agency In-Kind Volunteer	\$68,614		\$68,614	\$1.57
40					
41					
42					
43	TOTAL NON HSA-DAAS REVENUES	\$174,195		\$174,195	\$3.98
44	PER MEAL COST, NON HSA-DAAS	\$3.98		\$3.98	\$3.98
45	TOTAL DAAS & NON-DAAS REVENUES	\$315,808		\$315,808	
46	PER MEAL COST, TOTAL	\$7.21		\$7.21	
47	Full Time Equivalent (FTE)				
48					
49	Prepared by:	Phone No.:		Date:	
50	HSA-CO Review Signature:	_____			
51	HSA #1 (10/20/15)				

	A	B	C	D	E	F	G	H
1	Project Open Hand						Appendix B-1, page 2	
2	Program Name:						Date:	5/25/16
3	Cong-ENP Breakfast							
4								
5								
6								
7								
8	DAAS	Salaries & Benefits Detail						
9	POSITION TITLE and NAME	Agency Totals		For DAAS Nutrition		Year 1		TOTAL
10		Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		Total
11	Director -- N. Lopez	\$105,000	100%	45%	10%	\$10,504		\$10,504
12	Sites Manager -- A. Mekler	\$60,000	100%	100%	22%	\$13,200		\$13,200
13	Sites Manager -- J. Nagel	\$60,000	100%	100%	22%	\$13,200		\$13,200
14	Admin.Asst. -- M.Aguilar	\$35,360	100%	100%	22%	\$7,779		\$7,779
15	Site Coordinators - 25 pp.	\$330,460	100%	100%	22%	\$72,701		\$72,701
16	Cook - R. Santa Ana	\$31,055	100%	38%	8%	\$2,596		\$2,596
17	Cook - S. Gilmore	\$45,000	100%	53%	12%	\$5,247		\$5,247
18	Cook - J. Pensabene	\$26,520	100%	38%	8%	\$2,217		\$2,217
19	Cook - Open	\$29,120	100%	38%	8%	\$2,434		\$2,434
20	Swing Cook - M. Gillet	\$31,200	100%	38%	8%	\$2,608		\$2,608
21	Swing Cook - Open	\$31,200	100%	38%	8%	\$2,608		\$2,608
22	Swing Cook - Open	\$31,200	100%	38%	8%	\$2,608		\$2,608
23	Porter - L. Barrera	\$24,960	100%	38%	8%	\$2,087		\$2,087
24	Porter - F. Guinto	\$26,520	100%	38%	7%	\$1,822		\$1,822
25	TOTALS	\$ 867,595	1400%	757%	165%	\$141,613		\$141,613
26	FRINGE BENEFIT RATE	0.00%						
27	EMPLOYEE FRINGE BENEFITS	\$ -				\$0		\$0
28								
29	TOTAL DAAS SALARIES & BENEFITS	\$ 867,595				\$141,613		\$141,613
30								
31								
32	Non-DAAS	Salaries & Benefits Detail						
33	POSITION TITLE and NAME	Agency Totals		Nutrition		Year 1		TOTAL
34		Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		Total
35	Volunteers	\$27,040	100%	254%	254%	\$68,614		\$68,614
36								
37	TOTALS	\$ 27,040	100%	0%	0%	\$68,614		\$68,614
38								
39	FRINGE BENEFIT RATE	0.00%						
40	EMPLOYEE FRINGE BENEFITS	\$ -				\$0		\$0
41								
42	TOTAL DAAS SALARIES & BENEFITS	\$ 27,040				\$68,614		\$68,614
43								
44								
45	NOTE: Green highlighted cells have formulas that link data to Budget Summary page							
46	Cells with formulas are protected to avoid accidental changes. To unprotect, go to "Tools" then "Unprotect sheet"							

	A	B	C	D	E	F	G	H	I
1	Project Open Hand								Appendix B-1, page 3
2	Program Name:								5/25/16
3	Cong-ENP Breakfast								
4									
5									
6		Annual #Meals Contracted:		43,810					TOTAL
7	<u>Expenditure Category</u>		Term:	Year 1					Total
8	Rental of Property								
9	Utilities(Elec, Water, Gas, Phone, Scavenger)								
10	Office Supplies, Postage								
11	Building Maintenance Supplies and Repair								
12	FOOD COSTS								
13	Raw Food	<i>per meal</i>							
14	Cong Food Svc Supplie:	<i>per meal</i>							
15	Raw Food Breakfast	<i>per meal</i>							
16	Catered Meals	<i>per meal</i>							
17	CONSULTANT/SUBCONTRACTOR	Descriptive Title							
18									
19									
20	OTHER COSTS:								
21	Insurance								
22	Staff Training & Travel								
23	Rental of Equipment								
24	Small Equipment (over \$500 but under \$5,000/item)								
25	Auto - Fuel & Insurance								
26	Repair/Maintenance								
27									
28									
29	TOTAL DAAS OPERATING EXPENSE				\$0				\$0
30									
31									
32	Non-DAAS								TOTAL
33	<u>Expenditure Category</u>		Program						
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	<i>per meal</i>	\$ 2.16		\$94,629				\$94,629
40	Cong Food Svc Supplie:	<i>per meal</i>	\$ 0.25		\$10,952				\$10,952
41	HDM Food Svc Supplie:	<i>per meal</i>							
42	Catered Meals	<i>per meal</i>							
43	CONSULTANT/SUBCONTRACTOR	Descriptive Title							
44	Registered Dietitian								
45									
46	OTHER COSTS:								
47	Insurance								
48	Staff Training & Travel								
49	Rental of Equipment								
50	Small Equipment (over \$500 but under \$5,000/item)								
51	Auto - Fuel & Insurance								
52	Repair/Maintenance								
53									
54									
55									
56	TOTAL Non-DAAS OPERATING EXPENSE				\$105,581				\$105,581
57									
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE				\$105,581				\$105,581
59									
60	HSA #3								
61	NOTE: Green highlighted cells have formulas that link data to Budget Summary page								
62	Allocation Methodology: <i>If you have multiple programs, describe how you allocate among shared</i>								

**Appendix A1 – Services to be Provided
Russian American Community Services
Elderly Nutrition Program (ENP) Congregate Meals
July 1, 2016 – June 30, 2017**

I. Purpose

The purpose of this grant is to assist older individuals 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	Russian American Community Services
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
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 Adult and Aging Services
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
HSA	Human Services Agency of the City and County of San Francisco
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.

Nutrition Education

The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education services shall be provided by a dietitian or by personnel trained or approved by the dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a qualified dietitian. Coordination with community resource is encouraged. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. The nutrition education activities shall be provided on quarterly basis and documented. One unit is defined as one nutrition education presentation provided to one participant.

OOA

Office on the 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.

Low-Income

100% 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.

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.

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.

Title 22 Regulations

Refers to Barclay's official California Cod 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.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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 Meals, an individual must meet either one of the following criteria:

- A senior, age 60 or above
- Spouse or domestic partner of a senior
- A person under age 60, with a disability who resides in housing facilities occupied primarily by older adults at which congregate nutrition services are provided
- A disabled individual who resides at home with and accompanies a senior who participates in the program
- A volunteer under age 60 who helps in the program may be offered a meal if doing so will not deprive a senior of a meal

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants 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 CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- 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 at least three times a year by a RD. The HACCP monitoring must be conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. 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.

- 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 by April 30 of each funding year. 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 either 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 mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. 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>

VI. Service Objectives

- A. Grantee will serve the total of 460 unduplicated consumers
- B. Grantee will serve the total number of 34,149 authorized meals

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
- B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
- C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
- D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they learned to make healthier food choices and/or learn to improve safe food handling practices.
- E. To provide access to socialization activities. At least 75% of the participants report increased access to socialization activities and interactions with others.

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all

reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. 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.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.

- G. Grantee will provide other reports as requested.
- H. 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:

Rocio Duenas
Senior Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Rocio.Duenas@sfgov.org

Tiffany Kearney, RD
Nutritionist/OOA
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Tiffany.Kearney@sfgov.org

	A	B	C	D	E
1	BUDGET FORMS			Appendix B1, pg. 1	
2				Document Date: 6/3/2016	
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERV				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: Russian American Comm. Services			Grant Term	
6	(Check One) New Renewal <u>X</u> Modification ____				
7	Effective Date of Mod: 7/1/16		No. of Mod:	7/1/16 to 6/30/17	
8	Program: Cong-ENP	Cong-ENP		TOTAL	Average cost/meal
9	Annual #Meals Contracted	34,149		34,149	
10	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17	
11	DAAS Expenditures				
12	Salaries & Benefits	\$109,610		\$109,610	\$3.21
13	Operating Expense	\$119,881		\$119,881	\$3.51
14	Subtotal	\$229,491		\$229,491	\$6.72
15	Indirect Percentage (max 10%)	0%		0%	
16	Indirect Cost (Line 14 X Line 13)	\$0		\$0	\$0.00
17	Capital Expenditure	\$0		\$0	\$0.00
18	TOTAL DAAS EXPENDITURES	\$229,491		\$229,491	\$6.72
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$23,317		\$23,317	\$0.68
22	Operating Expense	\$24,734		\$24,734	\$0.72
23	Capital Expenditure	\$0		\$0	\$0.00
24	TOTAL Non-DAAS EXPENDITURES	\$48,051		\$48,051	\$1.41
25					
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$277,543		\$277,543	\$8.13
27					
28	HSA-DAAS Revenues				
29	Meals	\$229,491		\$229,491	
30					
31					
32					
33					
34	TOTAL HSA-DAAS REVENUES	\$229,491		\$229,491	
35	PER MEAL COST, HSA-DAAS	\$6.72		\$6.72	
36	Non-DAAS Revenues				
37	Project Income	28,500		\$28,500	\$0.83
38	Agency Cash - Fundraising	\$2,051		\$2,051	\$0.06
39	Agency In-Kind Volunteer	\$17,500		\$17,500	\$0.51
40					
41					
42					
43	TOTAL NON HSA-DAAS REVENUES	\$48,051		\$48,051	
44	PER MEAL COST, NON HSA-DAAS	\$1.41		\$1.41	
45	TOTAL REVENUES	\$277,542		\$277,542	
46	PER MEAL COST, TOTAL	\$8.13		\$8.13	
47	Full Time Equivalent (FTE)				
49	Prepared by: Nick Buick	Phone No.:	415-387-5336		
50	HSA-CO Review Signature: _____	Date: _____			
51	HSA #1 (11/14/13)				

	A	B	C	D	E	F	G	H
1	Grantee's Name: Russian American Comm. Services						Appendix B1, page 2	
2	Program Name:						Date: 6/3/16	
3	Cong-ENP							
4								
5	Salaries & Benefits Detail							
6								
7	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17		TOTAL
8	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/16 to 6/30/17
9	Executive Director	\$82,272	100.00%	15.00%	15.00%	\$12,341		\$12,341
10	Site manager-hostess	\$29,640	50.00%	100.00%	50.00%	\$14,820		\$14,820
11	Cook I	\$39,520	100.00%	51.94%	51.94%	\$20,527		\$20,527
12	Cook II	\$33,280	100.00%	51.94%	51.94%	\$17,286		\$17,286
13	Cook III (relief)	\$28,080	62.50%	51.94%	32.46%	\$9,115		\$9,115
14	Kitchen aide	\$28,080	93.75%	46.75%	43.83%	\$12,307		\$12,307
15	c1 coordinator	\$33,280	62.50%	35.04%	21.90%	\$7,288		\$7,288
16								
17	TOTALS	\$ 274,152	569%	338%	252%	\$93,684		\$93,684
18								
19	FRINGE BENEFIT RATE	17.00%						
20	EMPLOYEE FRINGE BENEFITS	\$ 46,606				\$15,926		\$15,926
21								
22								
23	TOTAL DAAS SALARIES & BENEFITS	\$ 320,758				\$109,610		\$109,610
24								
25								
26	Non - DAAS	Agency Totals		For DAAS Meal				TOTAL
27	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/16 to 6/30/17
28	Meal site & kitchen volunteers	\$27,040	100%	20%	20%	\$5,500		\$5,500
29	Executive Director	\$82,272	100%	13%	13%	\$10,728		\$10,728
30	Cook III (relief)	\$28,080	19%	100%	19%	\$5,265		\$5,265
31								
32								
33								
34								
35								
36								
37								
38								
39	TOTAL NON-DAAS	\$ 137,392	2.19	1.33	0.52	\$21,494		\$21,494
40								
41	FRINGE BENEFIT RATE	17%						
42	EMPLOYEE FRINGE BENEFITS	\$ 23,357				\$1,824		\$1,824
43								
44								
45	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 160,749				\$23,317		\$23,317
46								
47	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 481,506				\$132,927		\$132,927

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: Russian American							Appendix B1, page 3	
2	Program Name:							Date: 6/3/16	
3	Cong-ENP								
4	Operating Expense Detail								
7	H.S.A-DAAS	Annual #Meals Contracted:	34,149						TOTAL
8	<u>Expenditure Category</u>	Term	7/1/16 to 6/30/17						7/1/16 to 6/30/17
9	Rental of Property								
10	Utilities(Elec, Water, Gas, Phone, Scavenger)			\$8,000				\$8,000	
11	Office Supplies, Postage			\$3,700				\$3,700	
12	Building Maintenance Supplies and Repair			\$2,466				\$2,466	
13	FOOD COSTS								
14	Raw Food	per meal \$ 2.73		\$93,227				\$93,227	
15	Cong Food Svc Supplies	per meal \$ 0.19		\$6,488				\$6,488	
16	HDM Food Svc Supplies	per meal							
17	Catered Meals	per meal							
18	CONSULTANT/SUBCONTRACTOR Descriptive Title								
19	Registered Dietitian								
20									
21	OTHER COSTS:								
22	Insurance			\$4,000				\$4,000	
23	Staff Training & Travel								
24	Rental of Equipment			\$2,000				\$2,000	
25	Small equipment & Supplies								
26	Auto - Fuel & Insurance								
27	Repair/Maintenance								
28									
29									
30	TOTAL DAAS OPERATING EXPENSE				\$119,881				\$119,881
32	Non-DAAS								TOTAL
33	<u>Expenditure Category</u>	Program							
34	Rental of Property			\$12,000				\$12,000	
35	Utilities(Elec, Water, Gas, Phone, Scavenger)			\$1,000				\$1,000	
36	Office Supplies, Postage			\$700				\$700	
37	Building Maintenance Supplies and Repair			\$2,534				\$2,534	
38	FOOD COSTS								
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	CONSULTANT/SUBCONTRACTOR Descriptive Title								
44	Registered Dietitian								
45									
46	OTHER COSTS:								
47	Insurance			\$1,500				\$1,500	
48	Staff Training & Travel			\$1,500				\$1,500	
49	Rental of Equipment			\$1,000				\$1,000	
50									
51	Small equipment & Supplies			\$3,000				\$3,000	
52	Auto - Fuel & Insurance								
53	Repair/Maintenance			\$1,500				\$1,500	
54									
55									
56	TOTAL Non-DAAS OPERATING EXPENSE				\$24,734				\$24,734
57									
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE				\$144,615				\$144,615

**Appendix A - Services to be Provided
Samoan Community Development Center
Elderly Nutrition Program (ENP) Congregate Meals
July 1, 2016 – June 30, 2017**

I. Purpose

The purpose of this grant is to assist older individuals 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	Samoan Community Development Center
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
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 Adult and Aging Services
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
HSA	Human Services Agency of the City and County of San Francisco
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.

Nutrition Education

The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education services shall be provided by a dietitian or by personnel trained or approved by the dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a qualified dietitian. Coordination with community resource is encouraged. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. The nutrition education activities shall be provided on quarterly basis and documented. One unit is defined as one nutrition education presentation provided to one participant.

OOA

Office on the 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.

Low-Income

100% 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.

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.

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.

Title 22 Regulations

Refers to Barclay's official California Cod 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.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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 Meals, an individual must meet either one of the following criteria:

- A senior, age 60 or above
- Spouse or domestic partner of a senior
- A person under age 60, with a disability who resides in housing facilities occupied primarily by older adults at which congregate nutrition services are provided
- A disabled individual who resides at home with and accompanies a senior who participates in the program
- A volunteer under age 60 who helps in the program may be offered a meal if doing so will not deprive a senior of a meal

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants 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 CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- 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 at least three times a year by a RD. The HACCP monitoring must be conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. 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.

- 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 by April 30 of each funding year. 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 either 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 mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. 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>

VI. Service Objectives

- A. Grantee will serve the total of 35 unduplicated consumers
- B. Grantee will serve the total number of 4,218 authorized meals

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
- B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
- C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
- D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they learned to make healthier food choices and/or learn to improve safe food handling practices.
- E. To provide access to socialization activities. At least 75% of the participants report increased access to socialization activities and interactions with others .

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. 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.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.
- G. Grantee will provide other reports as requested.

- H. 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
Senior Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Drake.Herrador@sfgov.org

Tiffany Kearney, RD
Nutritionist/OOA
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Tiffany.Kearney@sfgov.org

	A	B	C	D	E
1	BUDGET FORMS			Appendix B, pg. 1	
2				Document Date: 6/3/2016	
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: Samoan Community Development Center			Grant Term	
6	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification _____				
7	Effective Date of Mod: 7/1/13		No. of Mod: 7/1/16 to 6/30/17		
8	Program: Cong-ENP	Congregate Meals		TOTAL	Average cost/meal
9	Annual #Meals Contracted	4,218		4,218	\$5.50
10	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17	
11	DAAS Expenditures				
12	Salaries & Benefits	\$3,952		\$3,952	\$0.94
13	Operating Expense	\$23,199		\$23,199	\$5.50
14	Subtotal	\$27,151		\$27,151	\$6.44
15	Indirect Percentage (max 10%)	0%		0%	
16	Indirect Cost (Line 14 X Line 13)	\$0		\$0	\$0.00
17	Capital Expenditure	\$0		\$0	\$0.00
18	TOTAL DAAS EXPENDITURES	\$27,151		\$27,151	\$6.44
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$5,250		\$5,250	\$1.24
22	Operating Expense	\$1,055		\$1,055	\$0.25
23	Capital Expenditure	\$0		\$0	\$0.00
24	TOTAL Non-DAAS EXPENDITURES	\$6,305		\$6,305	\$1.49
25					
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$33,457		\$33,457	\$7.93
27					
28	HSA-DAAS Revenues				
29	Meals	\$27,151		\$27,151	
30					
31					
32					
33					
34	TOTAL HSA-DAAS REVENUES	\$27,151		\$27,151	
35	PER MEAL COST, HSA-DAAS	\$6.44		\$6.44	
36	Non-DAAS Revenues				
37	Project Income	\$2,700		\$2,700	\$0.64
38	Agency Cash - Fundraising	\$1,577		\$1,577	\$0.37
39	Agency In-Kind Volunteer	\$2,028		\$2,028	\$0.48
40	Nutrition Compliance/Quality Assurance				
41					
42					
43	TOTAL NON HSA-DAAS REVENUES	\$6,305		\$6,305	
44	PER MEAL COST, NON HSA-DAAS	\$1.49		\$1.49	
45	TOTAL REVENUES	\$33,456		\$33,456	
46	PER MEAL COST, TOTAL	\$7.93		\$7.93	
47	Full Time Equivalent (FTE)				
49	Prepared by:	Phone No.:			
50	HSA-CO Review Signature:	_____		Date: _____	
51	HSA #1 (11/14/13)				

	A	B	C	D	E	F	G	H
1	Grantee's Name: Samoan Community Development Center						Appendix B, page 2	
2	Program Name:						Date: 6/3/16	
3	Congregate Meals							
4								
5	Salaries & Benefits Detail							
6								
7								
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		1/16 to 6/30/17	TOTAL	
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	7/1/16 to 6/30/17	
10	Site Coordinator-Asoiva Faataui	\$45,552	60%	12%	7%	\$3,222		\$3,222
11								
12								
13								
14								
15								
16								
17								
18	TOTALS	\$ 45,552	60%	0%	0%	\$3,222		\$3,222
19								
20	FRINGE BENEFIT RATE	22.65%						
21	EMPLOYEE FRINGE BENEFITS	\$ 10,318				\$730		\$730
22								
23								
24	TOTAL DAAS SALARIES & BENEFITS	\$ 55,870				\$3,952		\$3,952
25								
26								
27	Non - DAAS	Agency Totals		For DAAS Meal			TOTAL	
28	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	7/1/16 to 6/30/17	
29	Volunteer Hours	\$27,040	100%	8%	8%	\$2,028		\$2,028
30	Site Coordinator-Asoiva Faataui	\$45,552	60%	12%	7%	\$3,222		\$3,222
31								
32								
33								
34								
35								
36								
37								
38								
39	TOTAL NON-DAAS	\$ 72,592				\$5,250		\$5,250
40								
41								
42	FRINGE BENEFIT RATE	0%						
43	EMPLOYEE FRINGE BENEFITS	\$ -				\$0		\$0
44								
45								
46	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 72,592				\$5,250		\$5,250
47								
48	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 128,462				\$9,203		\$9,203

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: Samoan Community Development Center								
2	Program Name: Congregate Meals								
3	Appendix B, page 3								
4	Date: 6/3/16								
5	Operating Expense Detail								
6									
7	H.S.A-DAAS	Annual #Meals Contracted:	4,218	0	TOTAL				
8	<u>Expenditure Category</u>	Term	7/1/16 to 6/30/17						7/1/16 to 6/30/17
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							
15	Cong Food Svc Supplies	per meal							
16	HDM Food Svc Supplies	per meal							
17	Catered Meals	per meal	\$ 5.25	\$22,145					\$22,145
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								
27	Repair/Maintenance								
28									
29									
30	TOTAL DAAS OPERATING EXPENSE			\$22,145					\$22,145
31									
32	Non-DAAS								TOTAL
33	<u>Expenditure Category</u>	Program							
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							
40	Cong Food Svc Supplies	per meal	\$ 0.25	\$1,055					\$1,055
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	Rental of Equipment								
51	Small equipment & Supplies								
52	Auto - Fuel & Insurance								
53	Repair/Maintenance								
54									
55									
56	TOTAL Non-DAAS OPERATING EXPENSE			\$1,055					\$1,055
57									
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE			\$23,199					\$23,199

Appendix A - Services to be Provided
Self-Help for the Elderly
Elderly Nutrition Program (ENP) Congregate Meals
July 1, 2016 – June 30, 2017

I. Purpose

The purpose of this grant is to assist older individuals 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	Self-Help for the Elderly
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
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 Adult and Aging Services
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
HSA	Human Services Agency of the City and County of San Francisco
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.

Nutrition Education

The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education services shall be provided by a dietitian or by personnel trained or approved by the dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a qualified dietitian. Coordination with community resource is encouraged. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. The nutrition education activities shall be provided on quarterly basis and documented. One unit is defined as one nutrition education presentation provided to one participant.

OOA

Office on the 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.

Low-Income

100% 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.

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.

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.

Title 22 Regulations

Refers to Barclay's official California Cod 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.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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 Meals, an individual must meet either one of the following criteria:

- A senior, age 60 or above
- Spouse or domestic partner of a senior
- A person under age 60, with a disability who resides in housing facilities occupied primarily by older adults at which congregate nutrition services are provided
- A disabled individual who resides at home with and accompanies a senior who participates in the program
- A volunteer under age 60 who helps in the program may be offered a meal if doing so will not deprive a senior of a meal

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants 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 CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- 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 at least three times a year by a RD. The HACCP monitoring must be

conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. 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.

- 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 by April 30 of each funding year. 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 mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to 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.
www.aging.ca.gov/Resources/Docs/SecurityAwarenessTrng.pps

VI. Service Objectives

- A. Grantee will serve the total of 4,100 unduplicated consumers
- B. Grantee will serve the total number of 204,785 authorized meals (187,573 regular and 17,212 CHAMPSS meals)
- C. Grantee will provide nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
- B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
- C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
- D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they learned to make healthier food choices and/or learn to improve safe food handling practices.
- E. To provide access to socialization activities. At least 75% of the participants report increased access to socialization activities and interactions with others.

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all

reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. 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.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.

- G. Grantee will provide other reports as requested.
- H. 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:

Tahir Shaikh
Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Tahir.Shaikh@sfgov.org

Linda Lau, RD
Lead Nutritionist/OOA
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Linda.Lau@sfgov.org

	A	B	C	D	E
1	BUDGET FORMS				Appendix B, pg. 1
2					Document Date: 6/10/2016
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: SELF-HELP FOR THE ELDERLY				Grant Term
6	(Check One) New Renewal <u> x </u> Modification <u> </u>				
7	Effective Date of Mod: 7/1/13		No. of Mod:		7/1/16 to 6/30/17
8	Program: Cong-ENP	CONG-ENP	CHAMPSS		TOTAL
9	Annual #Meals Contracted	187,573	17,212		204,785
10	Program Term	7/1/16 to 6/30/17	7/1/16 to 6/30/17		7/1/16 to 6/30/17
11	DAAS Expenditures				
12	Salaries & Benefits	\$344,179	\$48,672		\$392,851
13	Operating Expense	\$785,237	\$77,205		\$862,442
14	Subtotal	\$1,129,416	\$125,877		\$1,255,293
15	Indirect Percentage (max 10%)	10%	10%		10%
16	Indirect Cost (Line 14 X Line 13)	\$112,941	\$12,588		\$125,528
17	Capital Expenditure	\$0	\$0		\$0
18	TOTAL DAAS EXPENDITURES	\$1,242,356	\$138,465		\$1,380,821
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$146,250	\$0		\$146,250
22	Operating Expense	\$184,574	\$60,604		\$245,178
23	Indirect Cost	\$44,993	\$9,790		\$54,783
24	Capital Expenditure	\$0	\$0		\$0
25	TOTAL Non-DAAS EXPENDITURES	\$375,817	\$70,394		\$446,211
26					
27	TOTAL DAAS & Non-DAAS EXPENDITURES	\$1,618,174	\$208,859		\$1,827,032
28					
29	HSA-DAAS Revenues				
30	Local General Funds	\$543,843	\$138,465		\$682,308
31	Federal Funds	\$561,070			\$561,070
32	State Funds	\$137,443			\$137,443
33					
34					
35	TOTAL HSA-DAAS REVENUES	\$1,242,356	\$138,465		\$1,380,821
36	PER MEAL COST, HSA-DAAS	\$6.62	\$8.04		\$6.74
37	Non-DAAS Revenues				
38	Project Income	229,567	64,247		\$293,814
39	Agency Cash - Fundraising	\$0	\$6,147		\$6,147
40	Agency In-Kind Volunteer	\$146,250			\$146,250
41					
42					
43					
44	TOTAL NON HSA-DAAS REVENUES	\$375,817	\$70,394		\$446,211
45	PER MEAL COST, NON HSA-DAAS	\$2.00	\$4.09		\$2.18
46	TOTAL REVENUES	\$1,618,174	\$208,859		\$1,827,033
47	PER MEAL COST, TOTAL	\$8.63	\$12.13		\$8.92
48	Full Time Equivalent (FTE)				
50	Prepared by: Leny & Kelly	Phone No.: 415-677-7682		6/10/2016	
51	HSA-CO Review Signature: _____	Date: _____			
52	HSA #1 (11/14/13)				

	A	B	C	D	E	F	G	H	I	J	K	
1	Grantee's Name: SELF-HELP FOR THE ELDERLY										Appendix B, page 2	
2	Program Name:										Date: 6/10/16	
3	CONG-ENP											
4												
5	Salaries & Benefits Detail											
6												
7												
8	H.S.A-DAAS	Agency Totals				For DAAS Nutrition		7/1/16 to 6/30/17		CHAMPSS		TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	7/1/16 to 6/30/17				
10	Center Supervisor-F Ma	\$34,320	100%	50%	50%	\$17,160		\$17,160				
11	Center Coordinator-Chan, S	\$31,200	100%	50%	50%	\$15,600		\$15,600				
12	Center Coordinator-K Chiu	\$31,200	100%	50%	50%	\$15,600		\$15,600				
13	Center Coordinator-J. Chow	\$31,200	75%	50%	38%	\$11,856		\$11,856				
14	Center Coordinator-L. Ip	\$31,200	75%	50%	38%	\$11,856		\$11,856				
15	Center Coordinator-TBH	\$31,200	75%	50%	38%	\$11,856		\$11,856				
16	Center Coordinator-Y. Ku	\$29,120	75%	50%	38%	\$11,066		\$11,066				
17	Center Coordinator-K. Ma	\$31,200	75%	50%	38%	\$11,856		\$11,856				
18	Center Coordinator-J. Zhao	\$31,200	75%	50%	38%	\$11,856		\$11,856				
19	Driver-L Pearce	\$29,640	50%	100%	50%	\$14,820		\$14,820				
20	Driver-K Lin	\$29,640	50%	100%	50%	\$14,820		\$14,820				
21	Meal Site Worker-X Chen	\$28,080	63%	50%	31%	\$8,705		\$8,705				
22	Meal Site Worker-K Ip	\$28,080	63%	50%	31%	\$8,705		\$8,705				
23	Meal Site Worker-Q Chen	\$28,080	63%	50%	31%	\$8,705		\$8,705				
24	Meal Site Worker-M Li	\$28,080	63%	50%	31%	\$8,705		\$8,705				
25	Meal Site Worker-Y Liang	\$28,080	63%	50%	31%	\$8,705		\$8,705				
26	Meal Site Worker-Z Liu	\$28,080	63%	50%	31%	\$8,705		\$8,705				
27	Meal Site Worker-W Wong	\$28,080	63%	50%	31%	\$8,705		\$8,705				
28	Meal Site Worker-P Wu	\$28,080	63%	50%	31%	\$8,705		\$8,705				
29	Meal Site Worker-C Ye	\$28,080	63%	50%	31%	\$8,705		\$8,705				
30	Adm Coordinator-A Hui	\$40,560	100%	80%	80%	\$32,448		\$32,448				
31	Registered Dietitian-R Chan	\$62,400	9%	100%	9%	\$5,616		\$5,616				
32	CHAMPSS Coord-S Zhong	\$37,440	100%	100%	100%		\$37,440			\$37,440		
33												
34												
35												
36	TOTALS	\$ 734,240	1622%	1330%	896%	\$264,753	\$37,440			\$302,193		
37												
38	FRINGE BENEFIT RATE	30.00%										
39	EMPLOYEE FRINGE BENEFITS	\$ 220,272				\$79,426	\$11,232			\$90,658		
40												
41												
42	TOTAL DAAS SALARIES & BENEFITS	\$ 954,512				\$344,179	\$48,672			\$392,851		
43												
44												
45	Non - DAAS	Agency Totals				For DAAS Meal				TOTAL		
46	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	7/1/13 to 6/30/16				
47	Volunteers	\$ 27,040	100%	541%	541%	\$146,250		\$146,250				
48												
49												
50												
51												
52												
53												
54												
55	TOTAL NON-DAAS	\$ 27,040				\$146,250				\$146,250		
56												
57	FRINGE BENEFIT RATE	0%										
58	EMPLOYEE FRINGE BENEFITS	\$ -				\$0				\$0		
59												
60												
61	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 27,040				\$146,250				\$146,250		
62												
63	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 981,552				\$490,429	\$48,672			\$539,101		

	A	B	C	D	E	F	G	H	I	J	K
1	Grantee's Name: SELF-HELP FOF										Appendix B, page 3
2	Program Name:										Date: 6/10/16
3	CONG-ENP										
4	Operating Expense Detail										
5											
7	H.S.A-DAAS	Annual #Meals Contracted:			187,573		17,212				TOTAL
8	Expenditure Category	Term			7/1/16 to 6/30/17		7/1/16 to 6/30/17				7/1/16 to 6/30/17
9	Rental of Property				\$34,063						\$34,063
10	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$32,770						\$32,770
11	Office Supplies, Postage										
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 \$ 3.83			\$718,405		\$77,205				\$795,610
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										
27	Repair/Maintenance										
28											
29											
30	TOTAL DAAS OPERATING EXPENSE				\$785,237		\$77,205				\$862,442
32	Non-DAAS										TOTAL
33	Expenditure Category	Program									
34	Rental of Property				\$39,713		\$6,700				\$46,413
35	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$22,430		\$800				\$23,230
36	Office Supplies, Postage				\$2,000						\$2,000
37	Building Maintenance Supplies and Repair				\$22,800						\$22,800
38	FOOD COSTS										
39	Raw Food	per meal \$ 0.20			\$37,515						\$37,515
40	Cong Food Svc Supplies	per meal \$ 0.15			\$28,136						\$28,136
41	HDM Food Svc Supplies	per meal									
42	Catered Meals	per meal					\$47,484				\$47,484
43	CONSULTANT/SUBCONTRACTOR Descriptive Title										
44	Registered Dietitian										
45											
46	OTHER COSTS:										
47	Insurance				\$14,000						\$14,000
48	Staff Training & Travel				\$2,000		\$120				\$2,120
49	Rental of Equipment				\$5,820						\$5,820
50	Software & Website						\$5,500				\$5,500
51	Others				\$1,500						\$1,500
52	Auto - Fuel & Insurance				\$4,660						\$4,660
53	Repair/Maintenance				\$2,000						\$2,000
54	Recruitment Expenses				\$2,000						\$2,000
55											
56	TOTAL Non-DAAS OPERATING EXPENSE				\$184,574		\$60,604				\$245,178
57											
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE				\$969,812		\$137,809				\$1,107,621

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Self-Help for the Elderly

Nutrition Education:

Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
180	\$ 99.29	\$ 10.07	\$ 89.22

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

4	\$ 670.99	\$ 659.92	\$ 11.00
48	\$ 280.00	\$ 275.00	\$ 5.00
3	\$ 590.07	\$ 576.11	\$ 14.00
0			

Site/Route Monitoring (1 unit = 1 session completed):

Menu Planning & Analysis (1 unit = 1 set menu completed)

HDM Assessment (1 units = annual intake assessment & reassessment completed)

OTHER Nutrition Compliance:

In-service training to staff/volunteers (1 unit = 1 hour)

Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)

16	\$ 83.97	\$ 82.47	\$ 1.50
12			
4			

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:

Nutrition Education from City College of SF (CCSF): 5 sites x 2 hr per class x 32 weeks x \$50 = \$16,000

Nutrition Ed, #classes: 160 from CCSF + 20 units DAAS funded

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Contractor Name: **Self-Help for the Elderly** Term: **July 1, 2016 to June 30, 2017**

(Check One) New Renewal Modification

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

Program: Nutrition Compliance for ENP- Indicate HDM or Congregate CONG (ENP+CHAMPSS) REVENUE Cost Allocation:

Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
10 Program Term	7/1/16-6/30/17			
11 Expenditures				
12 Nutrition Education				
14 Salaries & Benefits	\$17,526	\$1,526	\$16,000	\$17,526
15 Operating Expense	\$122	\$122		\$122
16 Subtotal Direct	\$17,648	\$1,648	\$16,000	\$17,648
17 Indirect Percentage	12.0%	10.0%		
18 Indirect Expense	\$225	\$165	\$60	\$225
19 Total Nutrition Education	\$17,873	\$1,813	\$16,060	\$17,873
20 Nutrition Counseling				
21 Salaries & Benefits				
22 Operating Expense				
23 Subtotal Direct				
24 Indirect Percentage				
25 Indirect Expense				
26 Total Nutrition Counseling				
27 HCCP Kitchen Monitoring				
28 Salaries & Benefits	\$2,391	\$2,391		\$2,391
29 Operating Expense	\$9	\$9		\$9
30 Subtotal Direct	\$2,400	\$2,400		\$2,400
31 Indirect Percentage	12.0%	10.0%		
32 Indirect Expense	\$284	\$240	\$44	\$284
33 Total HCCP Kitchen Monitoring	\$2,684	\$2,640	\$44	\$2,684
34 Site/Route Monitoring				
35 Salaries & Benefits	\$11,726	\$11,726		\$11,726
36 Operating Expense	\$274	\$274		\$274
37 Subtotal Direct	\$12,000	\$12,000		\$12,000
38 Indirect Percentage	12.0%	10.0%		
39 Indirect Expense	\$1,440	\$1,200	\$240	\$1,440
40 Total Site/Route Monitoring	\$13,440	\$13,200	\$240	\$13,440
41 Menu Planning				
42 Salaries & Benefits	\$1,526	\$1,526		\$1,526
43 Operating Expense	\$45	\$45		\$45
44 Subtotal Direct	\$1,571	\$1,571		\$1,571
45 Indirect Percentage	12%	10%		
46 Indirect Expense	\$199	\$157	\$42	\$199
47 Total Menu Planning	\$1,770	\$1,728	\$42	\$1,770
48 HDM Assessments				
49 Salaries & Benefits				
50 Operating Expense				
51 Subtotal Direct				
52 Indirect Percentage				
53 Indirect Expense				
54 Total HDM Assessments				
55 Other Nutrition Compliance				
56 Salaries & Benefits	\$1,073	\$1,073		\$1,073
57 Operating Expense	\$127	\$127		\$127
58 Subtotal Direct	\$1,200	\$1,200		\$1,200
59 Indirect Percentage	12%	10%		
60 Indirect Expense	\$144	\$120	\$24	\$144
61 Total Other Nutrition Compliance	\$1,343	\$1,319	\$24	\$1,343
62 GRAND Total Expenditures	\$37,110	\$20,700	\$16,410	\$37,110
63 HSA Revenues		\$20,700		\$20,700
64				
65				
66 TOTAL HSA REVENUES		\$20,700		\$20,700
67 Other Non-H.S.A.-DAAS Revenues				
68			\$1,450	\$1,450
69				
70				
71 TOTAL OTHER REVENUES			\$1,450	\$1,450
72 Full Time Equivalent (FTE)				
74 Prepared by: Kelly Chew Telephone No.: 415-677-7606 Date 6/7/2016				
75 HSA-CO Review Signature: _____				
76 HSA #1				

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	Self-Help for the Elderly										
4	Program: Congregate Compliance (ENP & CHAMPSS)										
5	(Same as Line 9 on HSA #1)										
6											
7	Nutrition Education Operating Expense Detail										
8											
9											
10											
11											
12	<u>Expenditure Category</u>				<u>TERM 7/1/16-6/30/17</u>		<u>REVENUE Cost Allocation:</u>				<u>TOTAL</u>
							<u>H.S.A.-DAAS</u>	<u>DAAS</u>			<u>REVENUE</u>
13	Rental of Property										
14	Utilities(Elec, Water, Gas, Phone, Scavenger)										
15	Office Supplies, Postage										
16	Building Maintenance Supplies and Repair										
17	Printing and Reproduction				\$122		\$122				\$122
18	Insurance										
19	Staff Training										
20	Staff Travel										
21	Small Equipment (over \$500 but under \$5,000/item)										
22	Rental of Equipment										
23											
24	SUBCONTRACTORS Descriptive Title										
25											
26											
27											
28											
29											
30	OTHER										
31											
32											
33											
34											
35											
36											
37	TOTAL OPERATING EXPENSE				\$122		\$122				\$122
38											
39	HSA #3										

Self-Help for the Elderly
 Program: Congregate Compliance (ENP & CHAMPSS)
 (Same as Line 9 on HSA #1)

HCCP Kitchen Monitoring Salaries & Benefits Detail

POSITION TITLE	Agency Totals		For HSA Program		7/1/16-6/30/17			REVENUE Cost Allocation:		7/1/16-6/30/17
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue		
Director K. Chew	\$77,000	100%	1%	1%	\$746	\$746		\$746		
Nutrition Manager E. Ip	\$55,000	100%	1%	2%	\$1,100	\$1,100		\$1,100		
TOTALS		2.00	0.02	0.03	\$1,846	\$1,846		\$1,846		
FRINGE BENEFIT RATE	30%									
EMPLOYEE FRINGE BENEFITS					\$554	\$554		\$554		
TOTAL SALARIES & BENEFITS	\$0				\$2,400	\$2,400		\$2,400		
HSA #2										

	A	B	C	D	E	F	G	H	I	J	K
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											
39											

Site/Route & Kitchen Monitoring Operating Expense Detail

REVENUE Cost Allocation: TOTAL
 TERM 7/1/16-6/30/17 H.S.A.-DAAS DAAS REVENUE

Expenditure Category	TERM 7/1/16-6/30/17	H.S.A.-DAAS	DAAS	TOTAL REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)	\$274	\$274		\$274
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
TOTAL OPERATING EXPENSE	\$274	\$274		\$274

HSA #3

Self-Help for the Elderly
 Program: Congregate Compliance (ENP & CHAMPSS)
 (Same as Line 9 on HSA #1)

Menu Planning Operating Expense Detail

Expenditure Category	TERM 7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction	\$45	\$45		\$45
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
TOTAL OPERATING EXPENSE	\$45	\$45		\$45
HSA #3				

Self-Help for the Elderly
 Program: Congregate Compliance (ENP & CHAMPSS)
 (Same as Line 9 on HSA #1)

Other Nutrition Compliance Operating Expense Detail

Expenditure Category	TERM 7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL REVENUE
		H.S.A.-DAAS	Non-HSA-DAAS	
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage	\$27	\$27		\$27
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training	\$100	\$100		\$100
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
TOTAL OPERATING EXPENSE	\$127	\$127	\$0	\$127
HSA #3				

**Appendix A2 – Services to be Provided
 Centro Latino de San Francisco
 Elderly Nutrition Program (ENP), Home-Delivered Meals
 Effective July 1, 2016-June 30, 2017**

I. Purpose

The purpose of this grant is to assist older homebound individuals 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	Centro Latino de 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).
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
DAAS	Department of Adult and Aging 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 older individual who is either: (a) unable to perform at least two ADL or IADL 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	Home-delivered meals are provided to individuals who are homebound by reason of illness, incapacitating disability, isolation, lack of support network and have no safe, healthy alternative for meals, and 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. Service recipients must have a home visit reassessment by their service providers at least every other quarter.
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
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, iron, zinc, magnesium, vitamin A, vitamin C, vitamin D, vitamin E, niacin, riboflavin, thiamine, folic acid, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.
Nutrition Education	The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. Handouts material may be used as the sole nutrition education component for the home-delivered meal participants. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. Nutrition education activities shall be provided on a quarterly basis and documented. One set of materials is defined as one nutrition education unit provided to one participant.
OOA	Office on the 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.
Low-Income	100% 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.

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 counseling to HDM consumers who are receiving special diets.
Registered Dietitian	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.
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. http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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, an individual must meet the following criteria:

1. A senior, age 60 or above, who is frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals.
2. A spouse, domestic partner of a person in subsection (IV) (1) above, regardless of age or condition, if an assessment concludes that it is in the best interest of the homebound older individual.
3. An individual with a disability who resides at home with older individuals if an assessment concludes that it is in the best interest of the homebound older individual who participates in the program.
4. Priority shall be given to older individuals in (IV)(1) above

V. Services to be Provided

- A. Develop and maintain current home-delivered meal policies and procedures with the approval of OOA Nutritionist to meet the nutrition, food service, eligibility assessment and dietary counseling standards that ensure the provision of quality meals, adequate access to sound nutrition information enabling participants 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 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 delivered to neighborhoods as indicated on the DAAS-OOA approved Site Chart. Each meal shall meet the CDA and OOA menu requirements.
 3. Conduct annual comprehensive assessment and quarterly eligibility re-evaluation of each participant according to the OOA standards as specified in its policy manual. The comprehensive assessment and at least one re-evaluation must be completed at the home of the participant.
 4. 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 by the 5th working day of the month for the preceding month.
 5. Conduct nutrition risk screening annually for each participant and enter data in to CA-GetCare within one month of obtaining the participant's nutrition risk status.
 6. A suggested donation per meal requested of each participant must be approved by the Grantee's Board of Directors and OOA in advance.
- 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 (CRFD).
- 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 must be conducted on site and documented at least three times a year by a R.D at each production kitchen and for each delivery route at least three times a year. Grantee with four or more delivery routes will conduct a HDM route monitoring at least once a month. 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 by the specified due dates.
- 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 by April 30 of each fiscal year. 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 either 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 mandatory quarterly in-service training coordinated and provided by the OOA. and share the information with their staff and volunteers.
- J. The 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.
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>

VI. Service Objectives

- A. Grantee will provide 24,061 meals.
- B. Grantee will serve 126 unduplicated consumers.
- C. Grantee will provide nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
- B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
- C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
- D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they have learned to make healthier food choice and/or learned to improve safe food handling practices.

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFD and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the Nutrition Risk Screening form by the due date as specified by the OOA. At least 85% of enrolled clients should receive annual nutrition risk screening and 95% or more will receive ADL/IADL annual screening.
- B. Grantee will enter into CA-GetCare all the client level service units in the Service Recording Tool by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they have learned to make healthier food choices and/or learned to improve safe food handling practices.
- E. 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.
- F. Grantee will develop and maintain an updated Site Chart approved by OOA. A copy of the updated Site Chart will be kept in OOA’s contractor program file.
- G. Grantee will provide other reports as requested.
- H. 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, all other reports should be sent to the following addresses:

Tahir Shaikh
Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Tahir.shaikh@sfgov.org

Sarah Chan
Nutritionist/OOA
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Sarah.Chan@sfgov.org

	A	B	C	D	E
1	BUDGET FORMS				Appendix B2, pg. 1
2					Document Date: 6/3/2016
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
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"/>				
7	Effective Date of Mod: 7/1/16		No. of Mod:		7/1/16 to 6/30/17
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-YAD, or HDM-YAD)	HDM-ENP			TOTAL
9	Annual #Meals Contracted	24,061			24,061
10	Program Term	7/1/16 to 6/30/17			7/1/16 to 6/30/17
11	DAAS Expenditures				
12	Salaries & Benefits	\$90,950			\$90,950
13	Operating Expense	\$59,913			\$59,913
14	Subtotal	\$150,863			\$150,863
15	Indirect Percentage (max 10%)	0%			0%
16	Indirect Cost (Line 14 X Line 13)	\$0			\$0
17	Capital Expenditure	\$0			\$0
18	TOTAL DAAS EXPENDITURES	\$150,863			\$150,863
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$14,969			\$14,969
22	Operating Expense	\$28,868			\$28,868
23	Capital Expenditure	\$0			\$0
24	TOTAL Non-DAAS EXPENDITURES	\$43,837			\$43,837
25					
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$194,700			\$194,700
27					
28	HSA-DAAS Revenues				
29	Meals	\$150,863			\$150,863
30					
31					
32					
33					
34	TOTAL HSA-DAAS REVENUES	\$150,863			\$150,863
35	PER MEAL COST, HSA-DAAS	\$6.27			\$6.27
36	Non-DAAS Revenues				
37	Project Income	\$8,345			\$8,345
38	Facility In-Kind	\$20,523			\$20,523
39	Volunteer	\$14,969			\$14,969
40					
41					
42					
43	TOTAL NON HSA-DAAS REVENUES	\$43,837			\$43,837
44	PER MEAL COST, NON HSA-DAAS	\$1.82			\$1.82
45	TOTAL REVENUES	\$194,700			\$194,700
46	PER MEAL COST, TOTAL	\$8.09			\$8.09
47	Full Time Equivalent (FTE)				
49	Prepared by:	Phone No.:			
50	HSA-CO Review Signature:	Date:			
51	HSA #1 (11/14/13)				

	A	B	C	D	E	F	G	H	I	J	K	L
1	Grantee's Name: Centro Latino de San Francisco, Inc.										Appendix B2, page 2	
2	Program Name: HDM										Date: 6/3/16	
3	HDM-ENP											
4	Salaries & Benefits Detail											
5												
6												
7												
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17						TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary			7/1/16 to 6/30/17	
10	Executive Director, Bonilla, Gloria	\$78,208	95%	8%	7%	\$5,592					\$5,592	
11	Nutritionist/Activities Facilitator, Alvarez, Flor	\$43,680	75%	18%	14%	\$6,044					\$6,044	
12	Site Manager / Food Prep, Monge, Maria	\$29,120	100%	21%	21%	\$6,092					\$6,092	
13	Cook I, Crespin, Dora	\$41,600	100%	27%	27%	\$11,061					\$11,061	
14	Accountant/HR, Riano, Olivia	\$58,240	38%	14%	5%	\$3,072					\$3,072	
15	Social Worker, Rivera, Sylvia	\$41,600	88%	13%	13%	\$5,543					\$5,543	
16	Driver II v2, Valdiviezo, Raul	\$28,080	45%	94%	42%	\$11,826					\$11,826	
17	Programs Coordinator, Poveda, Olga	\$41,600	50%	10%	5%	\$2,149					\$2,149	
18	Manager - VC, Matus Rojas, Sofia	\$28,080	75%	9%	6%	\$1,822					\$1,822	
19	Driver I, Procorro Rodriguez	\$34,320	38%	48%	18%	\$6,148					\$6,148	
20	Driver II, Olivar Joaquin	\$28,080	58%	87%	50%	\$14,109					\$14,109	
21	Cook I - Asst., Ramirez, Olga	\$29,120	75%	11%	8%	\$2,393					\$2,393	
22	Food Service and Act. Instr., Omar Romero	\$31,200	100%	7%	7%	\$2,055					\$2,055	
23	Custodian, Driver II Javier Michel	\$29,120	17%	11%	2%	\$544					\$544	
24	Janitor, Castaneda Domingo	\$28,080	63%	28%	18%	\$4,990					\$4,990	
25												
26	TOTALS	\$ 570,128				\$83,440					\$83,440	
27												
28	FRINGE BENEFIT RATE	9.00%										
29	EMPLOYEE FRINGE BENEFITS	\$ 51,312				\$7,510					\$7,510	
30												
31												
32	TOTAL DAAS SALARIES & BENEFITS	\$ 621,440				\$90,950					\$90,950	
33												
34												
35	Non - DAAS	Agency Totals		For DAAS Meal								TOTAL
36	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary			7/1/13 to 6/30/16	
37	Volunteer Ipolito Bamaca	\$ 27,040	36%	7%	3%	\$713					\$713	
38	Volunteer Maria Hernandez	\$ 27,040	49%	8%	4%	\$1,056					\$1,056	
39	Volunteer Feliciano Preciado	\$ 27,040	49%	100%	49%	\$13,200					\$13,200	
40												
41												
42												
43												
44												
45												
46												
47												
48												
49	TOTAL NON-DAAS	\$ 81,120				\$14,969					\$14,969	
50												
51	FRINGE BENEFIT RATE	0%										
52	EMPLOYEE FRINGE BENEFITS	\$ -				\$0					\$0	
53												
54												
55	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 81,120				\$14,969					\$14,969	
56												
57	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 702,560				\$105,919					\$105,919	

	A	B	C	D	E	F	G	H	I	J	K
1	Grantee's Name: Centro Latino de										Appendix B2, page 3
2	Program Name: Home Delivery Meals										Date: 6/3/16
3	HDM-ENP										
4	Operating Expense Detail										
5											
7	H.S.A-DAAS	Annual #Meals Contracted:	24,061	0	0						TOTAL
8	Expenditure CategorW	Term	7/1/16 to 6/30/17								7/1/16 to 6/30/17
9	Rental of Property										
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$7,928								\$7,928
11	Office Supplies, Postage										
12	Building Maintenance Supplies and Repair		\$965								\$965
13	FOOD COSTS										
14	Raw Food	per meal \$ 1.21	\$29,114								\$29,114
15	Cong Food Svc Supplies	per meal \$ 0.26	\$6,256								\$6,256
16	HDM Food Svc Supplies	per meal									
17	Catered Meals	per meal									
18	CONSULTANT/SUBCONTRACTOR Descriptive Title										
19	Registered Dietitian										
20											
21	OTHER COSTS:										
22	Payroll		\$773								\$773
23	Accounting / Audit Fees		\$1,565								\$1,565
24	Stipends		\$1,260								\$1,260
25	Insurance (Liability)		\$1,789								\$1,789
26	Insurance (Vehicle)		\$7,555								\$7,555
27	Vehicle Costs		\$2,390								\$2,390
28	Printing		\$234								\$234
29	Staff Development		\$84								\$84
30	TOTAL DAAS OPERATING EXPENSE		\$59,913	\$0	\$0						\$59,913
32	Non-DAAS										
33	Expenditure Category	Program									TOTAL
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 \$ 0.35	\$8,345								\$8,345
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	Facility Rental (In-kind)		\$20,523								\$20,523
48											
49											
50											
51											
52											
53											
54											
55											
56	TOTAL Non-DAAS OPERATING EXPENSE		\$28,868	\$0	\$0						\$28,868
57											
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE		\$88,781	\$0	\$0						\$88,781

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM

	Year 1	Total Year 1	HSA-DAAS	Non-H.S.A

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

Site/Route Monitoring (1 unit = 1 session completed):

Menu Planning & Analysis (1 unit = 1 set menu completed)

HDM Assessment (1 units = annual intake assessment & reassessment completed)

	90	\$ 225.01	\$ 225.01	\$ 20,251

OTHER Nutrition Compliance:

In-service training to staff/volunteers (1 unit =1 hour)

Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)

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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

	A	B	C	D	E
1					
2					
3					
4					
5	Contractor Name			Term	
6				July 1, 2016 to June 30, 2017	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod. No. of Mod.				
9	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate	HDM Nutrition Compliance	REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			7/1/16-6/30/17
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits				
15	Operating Expense				
16	Subtotal Direct				
17	Indirect Percentage				
18	Indirect Expense				
19	Total Nutrition Education				
20	Nutrition Counseling				
21	Salaries & Benefits				
22	Operating Expense				
23	Subtotal Direct				
24	Indirect Percentage				
25	Indirect Expense				
26	Total Nutrition Counseling				
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits				
29	Operating Expense				
30	Subtotal Direct				
31	Indirect Percentage				
32	Indirect Expense				
33	Total HCCP Kitchen Monitoring				
34	Site/Route Monitoring				
35	Salaries & Benefits				
36	Operating Expense				
37	Subtotal Direct				
38	Indirect Percentage				
39	Indirect Expense				
40	Total Site/Route Monitoring				
41	Menu Planning				
42	Salaries & Benefits				
43	Operating Expense				
44	Subtotal Direct				
45	Indirect Percentage				
46	Indirect Expense				
47	Total Menu Planning				
48	HDM Assessments				
49	Salaries & Benefits	\$19,886	\$19,886	\$0	\$19,886
50	Operating Expense	\$365	\$365	\$0	\$365
51	Subtotal Direct	\$20,251	\$20,251	\$0	\$20,251
52	Indirect Percentage				
53	Indirect Expense	\$0	\$0	\$0	\$0
54	Total HDM Assessments	\$20,251	\$20,251	\$0	\$20,251
55	Other Nutrition Compliance				
56	Salaries & Benefits	\$0	\$0	\$0	\$0
57	Operating Expense	\$0	\$0	\$0	\$0
58	Subtotal Direct	\$0	\$0	\$0	\$0
59	Indirect Percentage				
60	Indirect Expense	\$0	\$0	\$0	\$0
61	Total Other Nutrition Compliance	\$0	\$0	\$0	\$0
62	GRAND Total Expenditures	\$20,251	\$20,251	\$0	\$20,251
63	HSA Revenues		\$20,251		\$20,251
64					
65					
66	TOTAL HSA REVENUES	\$20,251	\$20,251		\$20,251
67	Other Non-H.S.A.-DAAS Revenues			\$0	\$0
68					
69					
70					
71	TOTAL OTHER REVENUES			\$0	\$0
72	Full Time Equivalent (FTE)				
74	Prepared by: Gloria Bonilla	Telephone No.: 415-286-0883		Date 5-25-2016	
75	HSA-CO Review Signature: _____				
76	HSA #1 5/19/2016				

Program Name: HDM Nutrition Compliance
(Same as Line 9 on HSA #1)

HDM Assessment Operating Expense Detail

Expenditure Category	TERM	REVENUE Cost Allocation:		TOTAL REVENUE
		H.S.A.-DAAS	Non-HSA-DAAS	
Rental of Property	7/1/16-6/30/17			
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction		\$365		\$365
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
TOTAL OPERATING EXPENSE		\$365	\$0	\$365

HSA #3

**Appendix A – Services to be Provided
Jewish Family and Children’s Services**

**Elderly Nutrition Program (ENP), Home-Delivered Meals
Effective July 1, 2016 - June 30, 2017**

I. Purpose

The purpose of this grant is to assist older homebound individuals 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	Jewish Family and Children’s Services
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).
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
DAAS	Department of Adult and Aging 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 older individual who is either: (a) unable to perform at least two ADL or IADL 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	Home-delivered meals are provided to individuals who are homebound by reason of illness, incapacitating disability, isolation, lack of support network and have no safe, healthy alternative for meals, and 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. Service recipients must have a home visit reassessment by their service providers at least every other quarter.
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
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, iron, zinc, magnesium, vitamin A, vitamin C, vitamin D, vitamin E, niacin, riboflavin, thiamine, folic acid, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.
Nutrition Education	The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. Handouts material may be used as the sole nutrition education component for the home-delivered meal participants. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. Nutrition education activities shall be provided on a quarterly basis and documented. One service unit is defined as one nutrition education unit provided to one participant.
OOA	Office on the 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.

Low-Income	100% 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.
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 counseling by a Registered Dietitian to HDM consumers who are receiving special diets.
Registered Dietitian	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.
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. http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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, an individual must meet the following criteria:

1. A senior, age 60 or above, who is frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals.
2. A spouse ,domestic partner of a person in subsection (IV)(1) above, regardless of age or condition, if an assessment concludes that it is in the best interest of the homebound older individual.
3. An individual with a disability who resides at home with older individuals if an assessment concludes that it is in the best interest of the homebound older individual who participates in the program.
4. Priority shall be given to older individuals in (IV)(1) above.

V. Services to be Provided

- A. Develop and maintain current home-delivered meal policies and procedures with the approval of OOA Nutritionist to meet the nutrition, food service, eligibility assessment and dietary counseling standards that ensure the provision of quality meals, adequate access to sound nutrition information enabling participants 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 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 delivered to neighborhoods as indicated on the DAAS-OOA approved Site Chart. Each meal shall meet the CDA and OOA menu requirements.
 3. Conduct annual comprehensive assessment and quarterly eligibility re-evaluation of each participant according to the OOA standards as specified in its policy manual. The comprehensive assessment and at least one re-evaluation must be completed at the home of the participant.
 4. 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 by the 5th working day of the month for the preceding month.
 5. Conduct nutrition risk screening annually for each participant and enter data in to CA-GetCare within one month of obtaining the participant's nutrition risk status.
 6. A suggested donation per meal requested of each participant must be approved by the Grantee's Board of Directors and OOA in advance.
- 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 must be conducted on site and documented at least three times a year by a R.D at each production kitchen and for each delivery route at least three times a year. Grantee with four or more delivery routes will conduct a HDM route monitoring at least once a month. 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 by the specified due dates.
- 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 by April 30 of each fiscal year. 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 either 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 mandatory quarterly in-service training coordinated and provided by the OOA. and share the information with their staff and volunteers.
- J. The Grantee will have to 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.
<https://www.aging.ca.gov/docs/Resources/Docs/SecurityAwarenessTrng.pps>

VI. Service Objectives

- A. Grantee will serve the total number of 60 unduplicated consumers
B. Grantee will serve the total number of 10,378 authorized meals
C. Grantee will provide the total number of nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they have learned to make healthier food choice and/or learned to improve safe food handling practices.

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the Nutrition Risk Screening form by the due date as specified by the OOA. At least 85% of enrolled clients should receive annual nutrition risk screening and 95% or more will receive ADL/IADL annual screening.

- B. Grantee will enter into CA-GetCare all the client level service units in the Service Recording Tool by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
 - The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicate that they have learned to make healthier food choices and/or learned to improve safe food handling practices.
- E. 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.
- F. Grantee will develop and maintain an updated Site Chart approved by OOA. A copy of the updated Site Chart will be kept in OOA’s contractor program file.F. Grantee will provide other reports as requested.
- G. 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, all other reports should be sent to the following addresses:

Elena Baranoff (Worker GB #24)
 Senior Contract Manager/HSA
 P.O. Box 7988
 San Francisco, CA 94120

Tiffany Kearney, RD
 Nutritionist/OOA
 1650 Mission Street, 5th Floor
 San Francisco, CA 94103

Elena.Baranoff@sfgov.org

Tiffany.Kearney@sfgov.org

	A	B	C	D	E
1	BUDGET FORMS			Appendix B, pg. 1	Average cost/meal
2				Document Date: 6/2/2016	
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: Jewish Family and Children's Services			Grant Term	
6	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>				
7	Effective Date of Mod:	No. of Mod:	7/1/16 to 6/30/17		
8	Program: HDM-ENP	OOA Meals		TOTAL	
9	Annual #Meals Contracted	10,378		10,378	
10	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17	
11	DAAS Expenditures				
12	Salaries & Benefits	\$0		\$0	\$0.00
13	Operating Expense	\$68,703		\$68,703	\$6.62
14	Subtotal	\$68,703		\$68,703	\$6.62
15	Indirect Percentage (max 10%)				
16	Indirect Cost (Line 14 X Line 13)			\$0	\$0.00
17	Capital Expenditure	\$0		\$0	\$0.00
18	TOTAL DAAS EXPENDITURES	\$68,703		\$68,703	\$6.62
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$90,129		\$90,129	\$8.68
22	Operating Expense	\$71,419		\$71,419	\$6.88
23	Indirect Cost	\$23,992		\$23,992	\$2.31
24	Capital Expenditure	\$0		\$0	\$0.00
25	TOTAL Non-DAAS EXPENDITURES	\$185,540		\$185,540	\$17.88
26					
27	TOTAL DAAS & Non-DAAS EXPENDITURES	\$254,243		\$254,243	\$24.50
28					
29	HSA-DAAS Revenues				
30	Meals	\$68,703		\$68,703	
31					
32					
33					
34					
35	TOTAL HSA-DAAS REVENUES	\$68,703		\$68,703	
36	PER MEAL COST, HSA-DAAS	\$6.62		\$6.62	
37	Non-DAAS Revenues				
38	Project Income	30,000		\$30,000	\$2.89
39	Agency Cash - Fundraising	\$145,320		\$145,320	\$14.00
40	Agency In-Kind (rent)	\$10,220		\$10,220	\$0.98
41					
42					
43					
44	TOTAL NON HSA-DAAS REVENUES	\$185,540		\$185,540	
45	PER MEAL COST, NON HSA-DAAS	\$17.88		\$17.88	
46	TOTAL REVENUES	\$254,243		\$254,243	
47	PER MEAL COST, TOTAL	\$24.50		\$24.50	
48	Full Time Equivalent (FTE)	1.75			
49				Date:	
50	Prepared by: Traci Dobronravova, SAH Director		Phone No.: 415.449.3808		
51	HSA-CO Review Signature:			6/2/2016	
52	HSA #1 (11/14/13)				

	A	B	C	D	E	F	G	H	I	L
1	Grantee's Name: Jewish Family and Children's Services									
2	Program Name:									
3	OOA Meals									
4										
5	Salaries & Benefits Detail									
6										
7										
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17				TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary				7/1/16 to 6/30/17
10										
11										
12										
13										
14										
15										
16										
17										
18	TOTALS	\$ -	0%	0%	0%	\$0				\$0
19										
20	FRINGE BENEFIT RATE									
21	EMPLOYEE FRINGE BENEFITS					\$0				\$0
22										
23										
24	TOTAL DAAS SALARIES & BENEFITS					\$0				\$0
25										
26										
27	Non - DAAS	Agency Totals		For DAAS Meal						TOTAL
28	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary				7/1/16 to 6/30/17
29	T. Dobronravova, SAH Director	\$117,293	100%	2.67%	2.67%	\$3,128				\$3,128
30	M. Markowitz, Prg Director	\$68,250	100%	47.04%	47.04%	\$32,108				\$32,108
31	C. Reid/R. Leiva, C. Tanski, Drivers	\$29,250	125%	100%	125.33%	\$36,660				\$36,660
32										
33										
34										
35										
36										
37										
38										
39	TOTAL NON-DAAS	\$ 214,793	#####	149.71%	175.04%	\$71,896				\$71,896
40										
41	FRINGE BENEFIT RATE	25.36%								
42	EMPLOYEE FRINGE BENEFITS	\$ 54,473				\$18,233				\$18,233
43										
44										
45	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 269,266				\$90,129				\$90,129
46										
47	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 269,266				\$90,129				\$90,129

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: Jewish Family and							Appendix B, page 3	
2	Program Name:							Date: 6/2/16	
3	OOA Meals								
4	Operating Expense Detail								
5									
6	H.S.A-DAAS	Annual #Meals Contracted:		10,378		TOTAL			
7	<u>Expenditure Category</u>	Term:		7/1/16 to 6/30/17		7/1/16 to 6/30/17			
8	Rental of Property								
9	Utilities(Elec, Water, Gas, Phone, Scavenger)								
10	Office Supplies, Postage								
11	Building Maintenance Supplies and Repair								
12	FOOD COSTS								
13	Raw Food	<i>per meal</i> _____							
14	Cong Food Svc Supplie:	<i>per meal</i> _____							
15	HDM Food Svc Supplie:	<i>per meal</i> _____							
16	Catered Meals	<i>per meal</i> \$ 6.62		\$68,703		\$68,703			
17	CONSULTANT/SUBCONTRACTOR Descriptive Title								
18	Registered Dietitian								
19									
20	OTHER COSTS:								
21	Insurance								
22	Staff Training & Travel								
23	Rental of Equipment								
24	Small equipment & Supplies								
25	Auto - Fuel & Insurance								
26	Repair/Maintenance								
27									
28	TOTAL DAAS OPERATING EXPENSE			\$68,703		\$68,703			
29									
30	Non-DAAS								
31	<u>Expenditure Category</u>	Program							
32	Rental of Property			\$12,975		\$12,975			
33	Utilities(Elec, Water, Gas, Phone, Scavenger)			\$3,102		\$3,102			
34	Office Supplies, Postage			\$1,768		\$1,768			
35	Building Maintenance Supplies and Repair			\$2,542		\$2,542			
36	FOOD COSTS								
37	Raw Food	<i>per meal</i> _____							
38	Cong Food Svc Supplie:	<i>per meal</i> _____							
39	HDM Food Svc Supplie:	<i>per meal</i> \$ 0.66		\$6,860		\$6,860			
40	Catered Meals	<i>per meal</i> \$ 2.33		\$24,137		\$24,137			
41	CONSULTANT/SUBCONTRACTOR Descriptive Title								
42	Registered Dietitian								
43									
44	OTHER COSTS:								
45	Insurance								
46	Staff Training & Travel								
47	Rental of Equipment								
48	Small equipment & Supplies								
49	Auto - Fuel & Insurance								
50	Auto - Repairs/Maintenance								
51	Auto - Rentals								
52									
53	TOTAL Non-DAAS OPERATING EXPENSE			\$71,419		\$71,419			
54									
55	TOTAL DAAS & Non-DAAS OPERATING EXPENSE			\$140,122		\$140,122			

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
4	0	0	0

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

Site/Route Monitoring (1 unit = 1 session completed):

Menu Planning & Analysis (1 unit = 1 set menu completed)

HDM Assessment (1 units = annual intake assessment & reassessment completed)

55	195	195	0

OTHER Nutrition Compliance:

In-service training to staff/volunteers (1 unit =1 hour)

Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)

4	90	90	0
4			

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:

Food program director spends approximately 13% of her time on meal data reporting, intake nutrition screens and comprehensive assessments for a total of \$11,085

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Contractor Name: Jewish Family and Children's Services	Term July 1, 2016 to June 30, 2017
---	---------------------------------------

(Check One) New Renewal Modification

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

Program: Nutrition Compliance for ENP HDM		REVENUE Cost Allocation:		
--	--	---------------------------------	--	--

Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
------------------------------	--------	-------------	--------------	---------------

Program Term	7/1/16-6/30/17			
---------------------	----------------	--	--	--

Expenditures				
---------------------	--	--	--	--

HDM Assessments				
------------------------	--	--	--	--

Salaries & Benefits	\$10,725	\$10,725	\$0	\$10,725
---------------------	----------	----------	-----	----------

Operating Expense	\$0	\$0	\$0	\$0
-------------------	-----	-----	-----	-----

Subtotal Direct	\$10,725	\$10,725	\$0	\$10,725
-----------------	----------	----------	-----	----------

Indirect Percentage				
---------------------	--	--	--	--

Indirect Expense	\$0	\$0	\$0	\$0
------------------	-----	-----	-----	-----

Total HDM Assessments	\$10,725	\$10,725	\$0	\$10,725
------------------------------	-----------------	-----------------	------------	-----------------

Other Nutrition Compliance				
-----------------------------------	--	--	--	--

Salaries & Benefits	\$360	\$360	\$0	\$360
---------------------	-------	-------	-----	-------

Operating Expense	\$0	\$0	\$0	\$0
-------------------	-----	-----	-----	-----

Subtotal Direct	\$360	\$360	\$0	\$360
-----------------	-------	-------	-----	-------

Indirect Percentage				
---------------------	--	--	--	--

Indirect Expense	\$0	\$0	\$0	\$0
------------------	-----	-----	-----	-----

Total Other Nutrition Compliance	\$360	\$360	\$0	\$360
---	--------------	--------------	------------	--------------

GRAND Total Expenditures	\$11,085	\$11,085	\$0	\$11,085
---------------------------------	-----------------	-----------------	------------	-----------------

HSA Revenues	\$11,085	\$11,085		\$11,085
--------------	----------	----------	--	----------

--	--	--	--	--

--	--	--	--	--

TOTAL HSA REVENUES		\$0		\$0
---------------------------	--	------------	--	------------

Other Non-H.S.A.-DAAS Revenues				
--------------------------------	--	--	--	--

			\$0	\$0
--	--	--	-----	-----

--	--	--	--	--

TOTAL OTHER REVENUES			\$0	\$0
-----------------------------	--	--	------------	------------

Full Time Equivalent (FTE)		13%		
----------------------------	--	-----	--	--

--	--	--	--	--

Prepared by: Traci Dobronravova, SAH Director	Phone No.: 415.449.3808	Date: 5/23/16
---	-------------------------	---------------

HSA-CO Review Signature: _____	
--------------------------------	--

HSA #1	5/19/2016
--------	-----------

Program Name: JFCS ENP HDM
 (Same as Line 9 on HSA #1)

Other Nutrition Compliance Salaries & Benefits Detail

7/1/16-6/30/17

POSITION TITLE	Agency Totals		For HSA Program		For HSA Program	REVENUE Cost Allocation:		Total Revenue
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
In-Service Training:				0%				\$0
Attend OOA Quarterly Nutrition Meeting:								
M. Markowitz, Prog Director	\$68,250	100%	0.42%	0.42%	\$287	\$287	\$0	\$287
TOTALS	\$68,250	1.00	0.0042	0.0042	\$287	\$287	\$0	\$287
FRINGE BENEFIT RATE	25.36%							
EMPLOYEE FRINGE BENEFITS	\$17,309				\$73	\$73	\$0	\$73
TOTAL SALARIES & BENEFITS	\$85,559				\$360	\$360	\$0	\$360

Appendix A-1 – Services to be Provided
Kimochi, Inc.
Elderly Nutrition Program (ENP), Home-Delivered Meals
Effective July 1, 2016-June 30, 2017

I. Purpose

The purpose of this grant is to assist older homebound individuals 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	Kimochi, Inc.
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).
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
DAAS	Department of Adult and Aging 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 older individual who is either: (a) unable to perform at least two ADL or IADL 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	Home-delivered meals are provided to individuals who are homebound by reason of illness, incapacitating disability, isolation, lack of support network and have no safe, healthy alternative for meals, and 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. Service recipients must have a home visit reassessment by their service providers at least every other quarter.
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
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, iron, zinc, magnesium, vitamin A, vitamin C, vitamin D, vitamin E, niacin, riboflavin, thiamine, folic acid, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.
Nutrition Education	The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. Handouts material may be used as the sole nutrition education component for the home-delivered meal participants. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. Nutrition education activities shall be provided on a quarterly basis and documented. One set of materials is defined as one nutrition education unit provided to one participant.
OOA	Office on the 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.

Low-Income	100% 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.
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 counseling to HDM consumers who are receiving special diets.
Registered Dietitian	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.
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. http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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, an individual must meet the following criteria:

- A senior, age 60 or above, who is frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals.
- Spouse, domestic partner or person with a disability who resides at home with a homebound senior and an assessment concludes that provision of the meal is in the best interest of the senior.
- A volunteer under age 60 who helps in the program may be offered a meal if doing so will not deprive a senior of a meal.

V. Services to be Provided

- A. Develop and maintain current home-delivered meal policies and procedures with the approval of OOA Nutritionist to meet the nutrition, food service, eligibility assessment and dietary counseling standards that ensure the provision of quality meals, adequate access to sound nutrition information enabling participants 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 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 delivered to neighborhoods as indicated on the DAAS-OOA approved Site Chart. Each meal shall meet the CDA and OOA menu requirements.
 3. Conduct annual comprehensive assessment and quarterly eligibility re-evaluation of each participant according to the OOA standards as specified in its policy manual. The comprehensive assessment and at least one re-evaluation must be completed at the home of the participant.
 4. 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 by the 5th working day of the month for the preceding month .
 5. Conduct nutrition risk screening annually for each participant and enter data in to CA-GetCare within one month of obtaining the participant's nutrition risk status.
 6. A suggested donation per meal requested of each participant must be approved by the Grantee's Board of Directors and OOA in advance.
- 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 must be conducted on site and documented at least three times a year by a R.D at each production kitchen and for each delivery route at least three times a year. Grantee with four or more delivery routes will conduct a HDM route monitoring at least once a month. 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 by the specified due dates.
- 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 by April 30 of each fiscal year. 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 either 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 mandatory quarterly in-service training coordinated and provided by the OOA, and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. 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>

VI. Service Objectives

- A. Grantee will serve 140 unduplicated consumers.
- B. Grantee will serve 32,258 authorized meals
- C. Grantee will provide nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
- B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
- C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
- D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they have learned to make healthier food choice and/or learned to improve safe food handling practices.

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the Nutrition Risk Screening form by the due date as specified by the OOA. At least 85% of enrolled clients should receive annual nutrition risk screening and 95% or more will receive ADL/IADL annual screening.
- B. Grantee will enter into CA-GetCare all the client level service units in the Service Recording Tool by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicate that they have learned to make healthier food choices and/or learned to improve safe food handling practices.
- E. 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.
- F. Grantee will develop and maintain an updated Site Chart approved by OOA. A copy of the updated Site Chart will be kept in OOA's contractor program file F. Grantee will provide other reports as requested.
- G. 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, all other reports should be sent to the following addresses:

Justin Chan
Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Justin.chan@sfgov.org

Sarah Chan
Nutritionist/OOA
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Sarah.Chan@sfgov.org

	A	B	C	D	E
1	BUDGET FORMS			Appendix B-1, pg. 1	Average cost/meal
2	Document Date:			5/25/2016	
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: Kimochi, Inc.		Grant Term		
6			7/1/16 to 6/30/17		
7	Program: Cong-ENP, HDM-ENP, Cong-AWD, HDM-AWD	HD-ENP NEW		TOTAL	
8	Annual #Meals Contracted	32,258		32,258	
9	Program Term	7/1/16 to 6/30/17		7/1/15 to 6/30/17	
10	DAAS Expenditures				
11	Salaries & Benefits	\$92,318		\$92,318	\$2.86
12	Operating Expense	\$107,293		\$107,293	\$3.33
13	Subtotal	\$199,611		\$199,611	\$6.19
14	Indirect Percentage (%)	7.63%		7.63%	
15	Indirect Cost (Line 14 X Line 13)	\$15,226		\$15,226	\$0.47
16	Capital Expenditure	\$0		\$0	\$0.00
17	TOTAL DAAS EXPENDITURES	\$214,837		\$214,837	\$6.66
18					
19	Non-DAAS Expenditures				
20	Salaries & Benefits	\$53,548		\$53,548	\$1.66
21	Operating Expense	\$64,296		\$64,296	\$1.99
22	Indirect Cost	\$13,065		\$13,065	\$0.41
23	TOTAL Non-DAAS EXPENDITURES	\$130,909		\$130,909	\$4.06
24					
25	TOTAL DAAS & Non-DAAS EXPENDITURES	\$345,746		\$345,746	\$10.72
26					
27	HSA-DAAS Revenues				
28	Meals	\$214,837		\$214,837	
29					
30	TOTAL HSA-DAAS REVENUES	\$214,837		\$214,837	
31	Per MEAL COST, HSA-DAAS	\$6.66		\$6.66	
32					
33	Non-DAAS Revenues				
34	Project Income	\$70,000		\$70,000	\$2.17
35	Donations	\$22,555		\$22,555	\$0.70
36	Agency In-Kind Volunteer	\$34,000		\$34,000	\$1.05
37	Agency In-Kind Food	\$4,354		\$4,354	\$0.13
38					
39	TOTAL NON HSA-DAAS REVENUES	\$130,909		\$130,909	
40	PER MEAL COST, NON HSA-DAAS	\$ 4.06		\$ 4.06	\$4.06
41	TOTAL REVENUES	\$345,746		\$345,746	
42	PER MEAL COST, TOTAL	\$10.72		\$10.72	
43	Full Time Equivalent (FTE)				
44					
45	Prepared by: Rod Valdepenas	Phone No.: (415) 931-2294	Date: 5/24/16		
46	HSA-CO Review Signature: _____				
47	HSA #1 (10/20/15)				
48	NOTE: Cells with formulas are protected to avoid accidental changes. To unprotect, go to "Tools" then "Unprotect sheet". No pa				
49	Figures in column B are just examples. Replace these figures with your agency's actual figures in the Salary, Operating & Captial Detail worksheets.				

	A	B	C	D	E	F	G	H
1	Grantee's Name: Kimochi, Inc.					Appendix B-1, page 2		
2	Program Name:					Date: 5/25/16		
3	HD-ENP NEW							
4								
5	Salaries & Benefits Detail							
6								
7								
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17		TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/15 to 6/30/17
10	Potwasher 1	\$27,040	75%	38%	29%	\$7,752		\$7,752
11	Nutritionist	\$59,403	50%	2%	1%	\$594		\$594
12	Senior Center Coordinator	\$43,680	100%	1%	1%	\$266		\$266
13	Asst. Cook 2	\$30,160	75%	35%	26%	\$7,917		\$7,917
14	Asst. Cook 1	\$30,160	75%	35%	26%	\$7,917		\$7,917
15	Driver PTC 1	\$33,280	100%	13%	13%	\$4,160		\$4,160
16	Driver PTC 2	\$32,240	100%	13%	13%	\$4,030		\$4,030
17	Driver HD 1	\$31,200	75%	100%	75%	\$23,400		\$23,400
18	Driver PTC sub	\$27,040	25%	100%	25%	\$6,760		\$6,760
19	Transportation Coord.	\$45,760	100%	10%	10%	\$4,576		\$4,576
20								
21	TOTALS	\$ 359,963	775%	308%	189%	\$67,372		\$67,372
22								
23	FRINGE BENEFIT RATE	37.03%						
24	EMPLOYEE FRINGE BENEFITS	\$ 133,294				\$24,946		\$24,946
25								
26								
27	TOTAL DAAS SALARIES & BENEFITS	\$ 493,257				\$92,318		\$92,318
28								
29								
30	Non - DAAS	Agency Totals		For DAAS Meal				TOTAL
31	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/15 to 6/30/17
32	Agency In-Kind Volunteer	\$27,040	100%	128%	128%	\$34,000		\$34,000
33	Head Cook	\$36,400	75%	3%	2%	\$10,436		\$10,436
34	Asst. Cook 2	\$30,160	75%	3%	2%	\$730		\$730
35	Asst. Cook 1	\$30,160	75%	3%	2%	\$730		\$730
36								
37	TOTAL NON-DAAS	\$ 96,720	2.25	0.10	0.07	\$45,895		\$45,895
38								
39	FRINGE BENEFIT RATE	16.66%						
40	EMPLOYEE FRINGE BENEFITS	\$ 16,114				\$7,653		\$7,653
41								
42								
43	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 112,834				\$53,548		\$53,548
44								
45	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 606,091				\$145,866		\$145,866

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: Kimochi, Inc.							Appendix B-1, page	
2	Program Name:							Date:	5/25/2016
3	HD-ENP NEW								
4	Operating Expense Detail								
5									
6	H.S.A-DAAS	Annual #Meals Contracted:		<u>32,258</u>				TOTAL	
7	<u>Expenditure Category</u>		Term:	<u>7/1/16 to</u> <u>6/30/17</u>				<u>7/1/15 to 6/30/17</u>	
8	Auto - Fuel			<u>\$8,000</u>				<u>\$8,000</u>	
9	Auto - Insurance			<u>\$13,165</u>				<u>\$13,165</u>	
10	Auto - Maintenance			<u>\$9,101</u>				<u>\$9,101</u>	
11	Computer/IT/Website			<u>\$700</u>				<u>\$700</u>	
12	Dues/Subscriptions			<u>\$80</u>				<u>\$80</u>	
13	Insurance - D&O/Other			<u>\$190</u>				<u>\$190</u>	
14	Insurance - General			<u>\$1,350</u>				<u>\$1,350</u>	
15	Maintenance Contracts			<u>\$530</u>				<u>\$530</u>	
16	Outside Services			<u>\$2,550</u>				<u>\$2,550</u>	
17	Postage			<u>\$309</u>				<u>\$309</u>	
18	Printing			<u>\$1,050</u>				<u>\$1,050</u>	
19	Prof Services - Acctg			<u>\$955</u>				<u>\$955</u>	
20	Rent - Property			<u>\$16,321</u>				<u>\$16,321</u>	
21	Rent - Parking			<u>\$8,000</u>				<u>\$8,000</u>	
22	Supplies/Materials			<u>\$1,748</u>				<u>\$1,748</u>	
23	Telephone			<u>\$2,878</u>				<u>\$2,878</u>	
24	Utilities			<u>\$1,748</u>				<u>\$1,748</u>	
25									
26	FOOD COSTS								
27	Raw Food	<i>per meal</i>	<u>\$ 0.70</u>	<u>\$22,618</u>				<u>\$22,618</u>	
28	Cong Food Svc Supplies	<i>per meal</i>							
29	HDM Food Svc Supplies	<i>per meal</i>	<u>\$ 0.50</u>	<u>\$16,000</u>				<u>\$16,000</u>	
30		<i>per meal</i>							
31	TOTAL DAAS OPERATING EXPENSE			<u>\$107,293</u>				<u>\$107,293</u>	
32									
33	Non-DAAS							TOTAL	
34	<u>Expenditure Category</u>		Program						
35	Auto - Traffic Fine			<u>\$250</u>				<u>\$250</u>	
36	Auto - License			<u>\$1,917</u>				<u>\$1,917</u>	
37									
38	FOOD COSTS								
39	Raw Food	<i>per meal</i>	<u>\$ 1.79</u>	<u>\$57,775</u>				<u>\$57,775</u>	
40	Cong Food Svc Supplies	<i>per meal</i>							
41	HDM Food Svc Supplies	<i>per meal</i>							
42	In Kind Food	<i>per meal</i>	<u>\$0.13</u>	<u>\$4,354</u>				<u>\$4,354</u>	
43									
44									
45	TOTAL Non-DAAS OPERATING EXPENSE			<u>\$64,296</u>				<u>\$64,296</u>	
46									
47	TOTAL DAAS & Non-DAAS OPERATING EXPENSE			<u>\$171,589</u>				<u>\$171,589</u>	

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
4.0	110	110	0

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

1.5	660	660	0
-----	-----	-----	---

Site/Route Monitoring (1 unit = 1 session completed):

9.0	330	330	0
-----	-----	-----	---

Menu Planning & Analysis (1 unit = 1 set menu completed)

1.5	770	770	0
-----	-----	-----	---

HDM Assessment (1 units = annual intake assessment & reassessment completed)

138.0	220.73	220.7283	0
-------	--------	----------	---

OTHER Nutrition Compliance:

In-service training to staff/volunteers (1 unit =1 hour)

1.0	924	924	0
-----	-----	-----	---

Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)

1.0			

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:

	A	B	C	D	E
1	Appendix B-1a, Page 1				
2	Document Date:				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Contractor Name			Term	
6	Kimochi, Inc.			July 1, 2016 to June 30, 2017	
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate	HDM	REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits	\$400	\$400	\$0	\$400
15	Operating Expense	\$0	\$0	\$0	\$0
16	Subtotal Direct	\$400	\$400	\$0	\$400
17	Indirect Percentage	10.0%	10.0%		
18	Indirect Expense	\$40	\$40	\$0	\$40
19	Total Nutrition Education	\$440	\$440	\$0	\$440
20	Nutrition Counseling				
21	Salaries & Benefits	\$0	\$0	\$0	\$0
22	Operating Expense	\$0	\$0	\$0	\$0
23	Subtotal Direct	\$0	\$0	\$0	\$0
24	Indirect Percentage				
25	Indirect Expense	\$0	\$0	\$0	\$0
26	Total Nutrition Counseling	\$0	\$0	\$0	\$0
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits	\$900	\$900	\$0	\$900
29	Operating Expense	\$0	\$0	\$0	\$0
30	Subtotal Direct	\$900	\$900	\$0	\$900
31	Indirect Percentage	10.0%	10.0%		
32	Indirect Expense	\$90	\$90	\$0	\$90
33	Total HCCP Kitchen Monitoring	\$990	\$990	\$0	\$990
34	Site/Route Monitoring				
35	Salaries & Benefits	\$2,700	\$2,700	\$0	\$2,700
36	Operating Expense	\$0	\$0	\$0	\$0
37	Subtotal Direct	\$2,700	\$2,700	\$0	\$2,700
38	Indirect Percentage	10.0%	10.0%		
39	Indirect Expense	\$270	\$270	\$0	\$270
40	Total Site/Route Monitoring	\$2,970	\$2,970	\$0	\$2,970
41	Menu Planning				
42	Salaries & Benefits	\$1,050	\$1,050	\$0	\$1,050
43	Operating Expense	\$0	\$0	\$0	\$0
44	Subtotal Direct	\$1,050	\$1,050	\$0	\$1,050
45	Indirect Percentage	10.0%	10.0%		
46	Indirect Expense	\$105	\$105	\$0	\$105
47	Total Menu Planning	\$1,155	\$1,155	\$0	\$1,155
48	HDM Assessments				
49	Salaries & Benefits	\$24,581	\$24,581	\$0	\$24,581
50	Operating Expense	\$3,110	\$3,110	\$0	\$3,110
51	Subtotal Direct	\$27,691	\$27,691	\$0	\$27,691
52	Indirect Percentage	10.0%	10.0%		
53	Indirect Expense	\$2,769	\$2,769	\$0	\$2,769
54	Total HDM Assessments	\$30,461	\$30,461	\$0	\$30,461
55	Other Nutrition Compliance				
56	Salaries & Benefits	\$840	\$840	\$0	\$840
57	Operating Expense	\$0	\$0	\$0	\$0
58	Subtotal Direct	\$840	\$840	\$0	\$840
59	Indirect Percentage	10.0%	10.0%		
60	Indirect Expense	\$84	\$84	\$0	\$84
61	Total Other Nutrition Compliance	\$924	\$924	\$0	\$924
62	GRAND Total Expenditures	\$36,940	\$36,940	\$0	\$36,940
63	HSA Revenues				
64	Nutrition Compliance	\$36,100	\$36,100		\$36,100
65	Data Plan	\$840	\$640		\$640
66	TOTAL HSA REVENUES	\$36,940	\$36,740		\$36,740
67	Other Non-H.S.A.-DAAS Revenues				
68					
69					
70					
71	TOTAL OTHER REVENUES				
72	Full Time Equivalent (FTE)				
74	Prepared by:	Telephone No.:		Date	
75	HSA-CO Review Signature: _____				
76	HSA #1 6/8/2016				

Program Name: HDM
(Same as Line 9 on HSA #1)

Nutrition Education Salaries & Benefits Detail

7/1/16-6/30/17

11	12	Agency Totals		For HSA Program		For HSA Program	REVENUE Cost Allocation:		Total Revenue
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
13	Nutritionist	\$59,403	50%	1%	1%	\$400	\$400		\$400
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30	TOTALS	\$59,403	0.50	0.01	0.01	400.00	\$400		\$400
31									
32	FRINGE BENEFIT RATE	0%							
33	EMPLOYEE FRINGE BENEFITS	\$0				\$0	\$0		\$0
34									
35									
36	TOTAL SALARIES & BENEFITS	\$59,403				\$400	\$400		\$400
37	HSA #2								

Program Name:
(Same as Line 9 on HSA #1)

Site/Route & Kitchen Monitoring Salaries & Benefits Detail

7/1/16-6/30/17

11	12	Agency Totals		For HSA Program		or HSA Program		REVENUE Cost Allocation:		Total Revenue
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS		
13	Nutritionist	\$59,403	50%	9%	5%	\$2,700	\$2,700		\$2,700	
14										
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$59,403	0.50	0.09	0.05	2700.00	\$2,700		\$2,700	
31										
32	FRINGE BENEFIT RATE	0%								
33	EMPLOYEE FRINGE BENEFITS	\$0				\$0	\$0		\$0	
34										
35										
36	TOTAL SALARIES & BENEFITS	\$59,403				\$2,700	\$2,700		\$2,700	
37	HSA #2									6/8/2016

Program Name:
 (Same as Line 9 on HSA #1)

HDM Assessment Operating Expense Detail

Expenditure Category	TERM	REVENUE Cost Allocation:		TOTAL
		7/1/16-6/30/17	H.S.A.-DAAS	Non-HSA-DAAS
Rental of Property		\$2,270	\$2,270	\$2,270
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Data Plan		\$840	\$840	\$840
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
TOTAL OPERATING EXPENSE		\$3,110	\$3,110	\$3,110

6/8/2016

HSA #3

**Appendix A – Services to be Provided
Meals on Wheels of San Francisco
Elderly Nutrition Program (ENP), Home-Delivered Meals
Effective July 1, 2016-June 30, 2017**

I. Purpose

The purpose of this grant is to assist older homebound individuals 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).
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
DAAS	Department of Adult and Aging 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 older individual who is either: (a) unable to perform at least two ADL or IADL 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	Home-delivered meals are provided to individuals who are homebound by reason of illness, incapacitating disability, isolation, lack of support network and have no safe, healthy alternative for meals, and 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. Service recipients must have a home visit reassessment by their service providers at least every other quarter.
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
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, iron, zinc, magnesium, vitamin A, vitamin C, vitamin D, vitamin E, niacin, riboflavin, thiamine, folic acid, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.
Nutrition Education	The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. Handouts material may be used as the sole nutrition education component for the home-delivered meal participants. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. Nutrition education activities shall be provided on a quarterly basis and documented. One service unit is defined as one nutrition education unit provided to one participant.
OOA	Office on the 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.
Low-Income	100% 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.

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 counseling by a Registered Dietitian to HDM consumers who are receiving special diets.

Registered
Dietitian

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.

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.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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, an individual must meet the following criteria:

1. A senior, age 60 or above, who is frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals.
2. A spouse ,domestic partner of a person in subsection (IV)(1) above, regardless of age or condition, if an assessment concludes that it is in the best interest of the homebound older individual.
3. An individual with a disability who resides at home with older individuals if an assessment concludes that it is in the best interest of the homebound older individual who participates in the program.
4. Priority shall be given to older individuals in (IV)(1) above.

V. Services to be Provided

- A. Develop and maintain current home-delivered meal policies and procedures with the approval of OOA Nutritionist to meet the nutrition, food service, eligibility assessment and dietary counseling standards that ensure the provision of quality meals, adequate

access to sound nutrition information enabling participants 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 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 delivered to neighborhoods as indicated on the DAAS-OOA approved Site Chart. Each meal shall meet the CDA and OOA menu requirements.
 - 3. Conduct annual comprehensive assessment and quarterly eligibility re-evaluation of each participant according to the OOA standards as specified in its policy manual. The comprehensive assessment and at least one re-evaluation must be completed at the home of the participant.
 - 4. 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 by the 5th working day of the month for the preceding month .
 - 5. Conduct nutrition risk screening annually for each participant and enter data in to CA-GetCare within one month of obtaining the participant's nutrition risk status.
 - 6. A suggested donation per meal requested of each participant must be approved by the Grantee's Board of Directors and OOA in advance.

- 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 must be conducted on site and documented at least three times a year by a R.D at each production kitchen and for each delivery route at least three times a year. Grantee with four or more delivery routes will conduct a HDM route monitoring at least once a month. 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 by the specified due dates.

- 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 by April 30 of each fiscal year. 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 either 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 mandatory quarterly in-service training coordinated and provided by the OOA, and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.

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>

VI. Service Objectives

- A. Grantee will serve 2,900 unduplicated consumers.
- B. Grantee will serve 1,259,317 authorized meals.
- C. Grantee will provide nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
- B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
- C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
- D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they have learned to make healthier food choice and/or learned to improve safe food handling practices.

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the Nutrition Risk Screening form by the due date as specified by the OOA. At least 85% of enrolled clients should receive annual nutrition risk screening and 95% or more will receive ADL/IADL annual screening.
- B. Grantee will enter into CA-GetCare all the client level service units in the Service Recording Tool by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicate that they have learned to make healthier food choices and/or learned to improve safe food handling practices.
- E. 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.
- F. Grantee will develop and maintain an updated Site Chart approved by OOA. A copy of the updated Site Chart will be kept in OOA's contractor program file.
- G. Grantee will provide other reports as requested.
- H. 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, all other reports should be sent to the following addresses:

Tahir Shaikh
Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Tahir.Shaikh@sfgov.org

Sarah Chan
Nutritionist/OOA
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Sarah.Chan@sfgov.org

	A	B	C	D	E	F
1	BUDGET FORMS				Appendix B, pg. 1	
2					Document Date: 6/10/2016	
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES					
4	BUDGET PROPOSAL FORMS					
5	Grantee's Name: <input checked="" type="checkbox"/> Meals on Wheels of San Francisco				Grant Term	
6	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod: 7/1/13		No. of Mod:		7/1/16 to 6/30/17	
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-YAD, or HDM-YAD)		HDM-ENP		TOTAL	
9	Annual #Meals Contracted		1,259,317		1,259,317	
10	Program Term		7/1/16 to 6/30/17		7/1/16 to 6/30/17	Average Cost/Meal
11	DAAS Expenditures					
12	Salaries & Benefits		\$403,376		\$403,376	\$0.32
13	Operating Expense		\$3,557,182		\$3,557,182	\$2.82
14	Subtotal		\$3,960,558		\$3,960,558	\$3.15
15	Indirect Percentage (max 10%)		10%		10%	
16	Indirect Cost (Line 14 X Line 13)		\$396,056		\$396,056	\$0.31
17	Capital Expenditure		-		\$0	\$0.00
18	TOTAL DAAS EXPENDITURES		4,356,614		\$4,356,614	\$3.46
19						
20	Non-DAAS Expenditures					
21	Salaries & Benefits		\$1,585,804		\$1,585,804	\$1.26
22	Operating Expense		\$952,664		\$952,664	\$0.76
23	Capital Expenditure		-		\$0	\$0.00
24	TOTAL Non-DAAS EXPENDITURES		\$2,538,468		\$2,538,468	\$2.02
25						
26	TOTAL DAAS & Non-DAAS EXPENDITURES		\$6,895,082		\$6,895,082	\$5.48
27						
28	HSA-DAAS Revenues					
29	Local General Fund		\$2,382,525		\$2,382,525	
30	Federal funds		\$542,547		\$542,547	
31	State funds		\$271,278		\$271,278	
32	NSIP (federal) funds		\$1,160,264		\$1,160,264	
33					\$0	
34	TOTAL HSA-DAAS REVENUES		\$4,356,614		\$4,356,614	
35	PER MEAL COST, HSA-DAAS		3.46		\$3.46	
36	Non-DAAS Revenues					
37	Project Income		\$222,000		\$222,000	\$0.18
38	Agency Cash - Fundraising		\$2,216,468		\$2,216,468	\$1.76
39	Agency In-Kind Volunteer		\$100,000		\$100,000	\$0.08
40						
41						
42						
43	TOTAL NON HSA-DAAS REVENUES		2,538,468		\$2,538,468	
44	PER MEAL COST, NON HSA-DAAS		\$2.02		\$2.02	
45	TOTAL REVENUES		\$6,895,082		\$6,895,082	
46	PER MEAL COST, TOTAL		\$5.48		\$5.48	
47	Full Time Equivalent (FTE)					
49	Prepared by:		Phone No.:			
50	HSA-CO Review Signature: _____		Date: _____			
51	HSA #1 (11/14/13)					

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	Grantee's Name: Meals on Wheels of San Francisco												Appendix B, page 2		
2	Program Name:												Date: 6/10/16		
3	HDM-ENP														
4															
5	Salaries & Benefits Detail														
6															
7															
8	H.S.A-DAAS														
9	POSITION TITLE and NAME	Agency Totals												TOTAL	
10	Drivers	\$36,628	Please see the drivers' salary detail											\$193,922	
11	Chief Govt Officer	\$128,543	100%	86%	20%	17.2%	17%							\$22,109	
12	HDM Director	\$108,150	100%	86%	20%	17.2%	17%							\$18,602	
13	HDM Program Manger	\$72,872	100%	86%	20%	17.2%	17%							\$12,534	
14	HDM Dispatch Manger	\$63,308	100%	86%	20%	17.2%	17%							\$10,889	
15	HDM Client Relations and Office Manager	\$55,652	100%	86%	20%	17.2%	17%							\$9,572	
16	HDM Client Relations	\$48,547	100%	86%	20%	17.2%	17%							\$8,350	
17	HDM Assistant	\$32,909	100%	86%	20%	17.2%	17%							\$5,660	
18	Facility Director	\$74,984	100%	71%	20%	14.2%	14%							\$10,648	
19	Maintenance Worker	\$36,956	100%	69%	20%	13.8%	14%							\$5,100	
20	Volunteers Staff 1	\$84,975	100%	20%	0%	0.0%	0%							\$0	
21	Volunteers Staff 2	\$61,800	100%	20%	0%	0.0%	0%							\$0	
22	Volunteers Staff 3	\$61,800	100%	20%	0%	0.0%	0%							\$0	
23	TOTALS	\$ 1,862,436	1200%			148%	148%						\$0	\$0	\$297,387
24															
25	FRINGE BENEFIT RATE	35.64%													
26	EMPLOYEE FRINGE BENEFITS	\$ 663,772											\$0	\$0	\$105,989
27															
28															
29	TOTAL DAAS SALARIES & BENEFITS	\$ 2,526,208											\$0	\$0	\$403,376
30															
31															
32	Non - DAAS														
33	POSITION TITLE and NAME	Agency Totals												TOTAL	
34	Drivers 28.4 FTE Total Sal 1,058,461	\$36,628	Please see the drivers' salary detail											\$713,555	
35	Chief Govt Officer	\$128,543	100%	86%	80%	69%	69%							\$88,438	
36	HDM Director	\$108,150	100%	86%	80%	69%	69%							\$74,407	
37	HDM Program Manger	\$72,872	100%	86%	80%	69%	69%							\$50,136	
38	HDM Dispatch Manger	\$63,308	100%	86%	80%	69%	69%							\$43,556	
39	HDM Client Relations and Office Manager	\$55,652	100%	86%	80%	69%	69%							\$38,289	
40	HDM Client Relations	\$48,547	100%	86%	80%	69%	69%							\$33,400	
41	HDM Assistant	\$32,909	100%	86%	80%	69%	69%							\$22,641	
42	Facility Director	\$74,984	100%	71%	80%	57%	57%							\$42,591	
43	Maintenance Worker	\$36,956	100%	69%	80%	55%	55%							\$20,400	
44	Volunteers Staff 1	\$84,975	100%	20%	100%	20%	20%							\$16,995	
45	Volunteers Staff 2	\$61,800	100%	20%	100%	20%	20%							\$12,360	
46	Volunteers Staff 3	\$61,800	100%	20%	100%	20%	20%							\$12,360	
47	TOTAL NON-DAAS	\$ 867,124											\$0	\$0	\$1,169,127
48															
49	FRINGE BENEFIT RATE	35.64%													
50	EMPLOYEE FRINGE BENEFITS	\$ 309,043											\$0	\$0	\$416,677
51															
52															
53	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 1,176,167											\$0	\$0	\$1,585,804
54															
55	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 3,702,375											\$0	\$0	\$1,989,180

LNAME	FNAME	HRS-YR	FTE	Dept	Salary	FRINGE	Comp	Total % FTE	Hours for	Charge to	% Nutr Prog	Adjusted Nutr	DAAS	Non DAAS	Non Daas
									HDM program	HDM	(b)	FTE	Budgeted Salary	%	
Burnett	Sharon	2,080	1.00	Driver	\$34,979	\$20,025	\$55,004	100%	86.0%	21.6%	18.6%	18.6%	\$6,501	67.4%	\$23,581
Chen	Daniel	2,080	1.00	Driver	\$36,956	\$20,599	\$57,555	100%	86.0%	21.6%	18.6%	18.6%	\$6,869	67.4%	\$24,914
Duarte	Philip	2,080	1.00	Driver	\$32,243	\$19,232	\$51,475	100%	86.0%	21.6%	18.6%	18.6%	\$5,993	67.4%	\$21,736
Fleming	James	1,248	0.60	Driver	\$21,094	\$15,998	\$37,092	60%	86.0%	21.6%	18.6%	11.2%	\$2,352	67.4%	\$14,220
Fuller	Ira	2,080	1.00	Driver	\$35,404	\$20,149	\$55,553	100%	86.0%	21.6%	18.6%	18.6%	\$6,580	67.4%	\$23,868
Gomez	Francisco	2,080	1.00	Driver	\$37,387	\$20,724	\$58,111	100%	86.0%	21.6%	18.6%	18.6%	\$6,949	67.4%	\$25,205
Harrington	Gerald	2,080	1.00	Driver	\$36,690	\$20,522	\$57,212	100%	86.0%	21.6%	18.6%	18.6%	\$6,819	67.4%	\$24,734
Hernandez	Oralia	2,080	1.00	Driver	\$34,284	\$19,824	\$54,108	100%	86.0%	21.6%	18.6%	18.6%	\$6,372	67.4%	\$23,112
Huang	Xing	2,080	1.00	Driver	\$34,577	\$19,909	\$54,486	100%	86.0%	21.6%	18.6%	18.6%	\$6,426	67.4%	\$23,260
Ishida	Philip	2,080	1.00	Driver	\$34,503	\$19,887	\$54,390	100%	86.0%	21.6%	18.6%	18.6%	\$6,413	67.4%	\$23,260
Kelley	Sheila	2,080	1.00	Driver	\$51,729	\$24,884	\$76,613	100%	86.0%	21.6%	18.6%	18.6%	\$9,614	67.4%	\$34,873
Kwong	Raymond	2,080	1.00	Driver	\$37,368	\$25,829	\$63,197	100%	86.0%	21.6%	18.6%	18.6%	\$6,945	67.4%	\$25,192
Lee	Kamari	2,080	1.00	Driver	\$33,016	\$19,456	\$52,472	100%	86.0%	21.6%	18.6%	18.6%	\$6,136	67.4%	\$22,257
Maher	Antoinette	2,080	1.00	Driver	\$43,606	\$22,528	\$66,133	100%	86.0%	21.6%	18.6%	18.6%	\$8,104	67.4%	\$29,397
Maldonado	Michael	2,080	1.00	Driver	\$36,425	\$20,445	\$56,870	100%	86.0%	21.6%	18.6%	18.6%	\$6,770	67.4%	\$24,556
Marcos	Noel	2,080	1.00	Driver	\$37,106	\$20,642	\$57,749	100%	86.0%	21.6%	18.6%	18.6%	\$6,896	67.4%	\$25,015
Mejia	Felipe	2,080	1.00	Driver	\$35,404	\$20,149	\$55,553	100%	86.0%	21.6%	18.6%	18.6%	\$6,580	67.4%	\$23,868
Pomele	Alafale	2,080	1.00	Driver	\$44,779	\$22,868	\$67,647	100%	86.0%	21.6%	18.6%	18.6%	\$8,322	67.4%	\$30,187
Sandoval	Adrian	2,080	1.00	Driver	\$35,651	\$20,220	\$55,871	100%	86.0%	21.6%	18.6%	18.6%	\$6,626	67.4%	\$24,034
Sefo	Viena	2,080	1.00	Driver	\$38,353	\$21,004	\$59,357	100%	86.0%	21.6%	18.6%	18.6%	\$7,128	67.4%	\$25,856
Suesue	Ivoga	2,080	1.00	Driver	\$41,159	\$21,818	\$62,977	100%	86.0%	21.6%	18.6%	18.6%	\$7,650	67.4%	\$27,747
Torres	Martha	2,080	1.00	Driver	\$35,949	\$20,307	\$56,256	100%	86.0%	21.6%	18.6%	18.6%	\$6,681	67.4%	\$24,235
Torres, R	Rigoberto	2,080	1.00	Driver	\$37,387	\$20,724	\$58,111	100%	86.0%	21.6%	18.6%	18.6%	\$6,949	67.4%	\$25,205
Vega	Rene	2,080	1.00	Driver	\$37,387	\$20,724	\$58,111	100%	86.0%	21.6%	18.6%	18.6%	\$6,949	67.4%	\$25,205
Yee	Roland	2,080	1.00	Driver	\$45,177	\$22,983	\$68,160	100%	86.0%	21.6%	18.6%	18.6%	\$8,396	67.4%	\$30,456
Zitsman	Mark	1,664	0.80	Driver	\$33,116	\$19,485	\$52,601	80%	86.0%	21.6%	18.6%	14.9%	\$4,924	67.4%	\$22,325
Alexander	Shavon	2,080	1.00	Driver	\$32,243	\$19,232	\$51,475	100%	86.0%	21.6%	18.6%	18.6%	\$5,993	67.4%	\$21,736
Sarmiento	Gemma	2,080	1.00	Driver	\$32,243	\$19,232	\$51,475	100%	86.0%	21.6%	18.6%	18.6%	\$5,993	67.4%	\$21,736
Bussell	Clarence	2,080	1.00	Driver	\$32,243	\$19,232	\$51,475	100%	86.0%	21.6%	18.6%	18.6%	\$5,993	67.4%	\$21,736
DAAS	73		28.40		\$1,058,461	\$598,630	\$1,657,091						\$193,922		\$713,555
					\$37,270								Agree to Salary Detail		

	A	B	C	D	E	F	G	H	I	J	K
1	Grantee's Name: Meals on Wheels										Appendix B, page 3
2	Program Name:										Date: 6/10/16
3	HDM-ENP										
4	Operating Expense Detail										
7	H.S.A-DAAS	Annual #Meals Contracted:	1,259,317	0	0						TOTAL
8	Expenditure Category	Term	7/1/16 to 6/30/17								7/1/16 to 6/30/17
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									
15	Cong Food Svc Supplies	per meal									
16	HDM Food Svc Supplies	per meal				\$8,427					\$8,427
17	Catered Meals	per meal \$ 2.82				\$3,548,755					\$3,548,755
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										
27	Repair/Maintenance										
28											
29											
30	TOTAL DAAS OPERATING EXPENSE					\$3,557,182	\$0	\$0			\$3,557,182
32	Non-DAAS										TOTAL
33	Expenditure Category	Program									
34	Rental of Property										
35	Utilities(Elec, Water, Gas, Phone, Scavenger)					\$107,491					\$107,491
36	Office Supplies, Postage					\$24,299					\$24,299
37	Building Maintenance Supplies and Repair					\$52,581					\$52,581
38	FOOD COSTS										
39	Raw Food	per meal									
40	Cong Food Svc Supplies	per meal									
41	HDM Food Svc Supplies	per meal \$ 0.40				\$494,131					\$494,131
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	Rental of Equipment										
51	Small equipment & Supplies										
52	Auto - Fuel & Insurance										
53	Delivery Costs- Fuel, Vehicle Maint.					\$157,496					\$157,496
54	Repair/Maintenance										
55	Outside Services					\$16,666					\$16,666
56	In Kind Expenses					\$100,000					\$100,000
57											
58	TOTAL Non-DAAS OPERATING EXPENSE					\$952,664	\$0	\$0			\$952,664
59											
60	TOTAL DAAS & Non-DAAS OPERATING EXPENSE					\$4,509,846	\$0	\$0			\$4,509,846

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
4	3,514	150	3,364

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

785	198	100	98
1,510			

HCCP Kitchen Monitoring (1 unit = 1 session completed)

Site/Route Monitoring (1 unit = 1 session completed):

Menu Planning & Analysis (1 unit = 1 set menu completed)

HDM Assessment (1 units = annual intake assessment & reassessment completed)

3	18,742	600	18,142
12	1,171	300	871
2	28,113	700	27,413
2,000	452	225	227

OTHER Nutrition Compliance:

In-service training to staff/volunteers (1 unit =1 hour)

Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)

8	125	125	-
4		-	
4	250	250	-

NOTES:

Cells with formulas are protected to avoid accidental changes. To unprotect, go to "Review" then "Unprotect sheet". Enter service units for THE year, as appropriate & if required for your program.

Budget Narrative:

	A	B	C	D	E
1	Appendix B1, Page 1				
2	Date: 6/2/16				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Contractor Name			Term	
6	Meral On Wheels			July 1, 2016 to June 30, 2017	
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate	ENP HDM Nutrition Compliance	REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits	\$14,056	\$600	\$13,456	\$14,056
15	Operating Expense	\$0	\$0	\$0	\$0
16	Subtotal Direct	\$14,056	\$600	\$13,456	\$14,056
17	Indirect Percentage	0.0%			
18	Indirect Expense	\$0	\$0	\$0	\$0
19	Total Nutrition Education	\$14,056	\$600	\$13,456	\$14,056
20	Nutrition Counseling				
21	Salaries & Benefits	\$140,564	\$78,500	\$62,064	\$140,564
22	Operating Expense	\$600	\$0	\$600	\$600
23	Subtotal Direct	\$141,164	\$78,500	\$62,664	\$141,164
24	Indirect Percentage	0.0%			
25	Indirect Expense	\$0	\$0	\$0	\$0
26	Total Nutrition Counseling	\$141,164	\$78,500	\$62,664	\$141,164
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits	\$56,226	\$1,800	\$54,426	\$56,226
29	Operating Expense	\$0	\$0	\$0	\$0
30	Subtotal Direct	\$56,226	\$1,800	\$54,426	\$56,226
31	Indirect Percentage	0.0%			
32	Indirect Expense	\$0	\$0	\$0	\$0
33	Total HCCP Kitchen Monitoring	\$56,226	\$1,800	\$54,426	\$56,226
34	Site/Route Monitoring				
35	Salaries & Benefits	\$14,056	\$3,600	\$10,456	\$14,056
36	Operating Expense	\$0	\$0	\$0	\$0
37	Subtotal Direct	\$14,056	\$3,600	\$10,456	\$14,056
38	Indirect Percentage	0.0%			
39	Indirect Expense	\$0	\$0	\$0	\$0
40	Total Site/Route Monitoring	\$14,056	\$3,600	\$10,456	\$14,056
41	Menu Planning				
42	Salaries & Benefits	\$56,226	\$1,400	\$54,826	\$56,226
43	Operating Expense	\$0	\$0	\$0	\$0
44	Subtotal Direct	\$56,226	\$1,400	\$54,826	\$56,226
45	Indirect Percentage	0.0%			
46	Indirect Expense	\$0	\$0	\$0	\$0
47	Total Menu Planning	\$56,226	\$1,400	\$54,826	\$56,226
48	HDM Assessments				
49	Salaries & Benefits	\$890,649	\$445,325	\$445,325	\$890,649
50	Operating Expense	\$13,800	\$4,675	\$9,125	\$13,800
51	Subtotal Direct	\$904,449	\$450,000	\$454,450	\$904,449
52	Indirect Percentage	0.0%	0.0%	0.0%	
53	Indirect Expense	\$0	\$0	\$0	\$0
54	Total HDM Assessments	\$904,449	\$450,000	\$454,450	\$904,449
55	Other Nutrition Compliance				
56	Salaries & Benefits	\$1,000	\$1,000	\$0	\$1,000
57	Operating Expense	\$0	\$0	\$0	\$0
58	Subtotal Direct	\$1,000	\$1,000	\$0	\$1,000
59	Indirect Percentage	0.0%			
60	Indirect Expense	\$0	\$0	\$0	\$0
61	Total Other Nutrition Compliance	\$1,000	\$1,000	\$0	\$1,000
62	HDM Data Plan	\$7,560	\$7,560	\$0	\$7,560
63	GRAND Total Expenditures	\$1,194,738	\$644,459	\$650,279	\$1,194,738
64	HSA Revenues		\$544,459		\$544,459
65					
66					
67	TOTAL HSA REVENUES		\$544,459		\$544,459
68	Other Non-H.S.A.-DAAS Revenues			\$650,279	\$650,279
69					
70					
71					
72	TOTAL OTHER REVENUES			\$650,279	\$650,279
73	Full Time Equivalent (FTE)				
75	Prepared by:	Telephone No.:		Date	
76	HSA-CO Review Signature:				
77	HSA #1				
78					
79	NOTES:				
80	Cells with formulas are protected to avoid accidental changes. To unprotect, go to "Review" then "Unprotect sheet". No password need				

4 Program Name: ENP HDM Nutrition Compliance
5 (Same as Line 9 on HSA #1)

Nutrition Education Operating Expense Detail

11			REVENUE Cost Allocation:		TOTAL	
12	Expenditure Category	TERM	7/1/16-6/30/17	H.S.A.-DAAS	DAAS	REVENUE
13	Rental of Property					
14	Utilities(Elec, Water, Gas, Phone, Scavenger)					
15	Office Supplies, Postage					
16	Building Maintenance Supplies and Repair					
17	Printing and Reproduction					
18	Insurance					
19	Staff Training					
20	Staff Travel					
21	Small Equipment (over \$500 but under \$5,000/item)					
22	Rental of Equipment					
23						
24	SUBCONTRACTORS Descriptive Title					
25						
26						
27						
28						
29						
30	OTHER					
31	HDM Data Pain		\$7,560	\$7,560		\$7,560
32						
33						
34						
35						
36						
37	TOTAL OPERATING EXPENSE		\$7,560	\$7,560		\$7,560
38						
39	HSA #3					

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3											
4	Program Name: ENP HDM Nutrition Compliance										
5	(Same as Line 9 on HSA #1)										
6											
7	Nutrition Counseling Operating Expense Detail										
8											
9											
10											
11											
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/16-6/30/17</u>		<u>REVENUE Cost Allocation:</u>				<u>TOTAL</u>
13	Rental of Property						<u>H.S.A.-DAAS</u>	<u>DAAS</u>			<u>REVENUE</u>
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$100		\$0	\$100			\$100
15	Office Supplies, Postage										
16	Training				\$500		\$0	\$500			\$500
17											
18	OTHER										
19											
20											
21											
22	TOTAL OPERATING EXPENSE				\$600		\$0	\$600			\$600
23											
24	HSA #3										
25											
26											

**Appendix A1 – Services to be Provided
On Lok Day Services
Elderly Nutrition Program (ENP), Home-Delivered Meals
Effective July 1, 2016-June 30, 2017**

I. Purpose

The purpose of this grant is to assist older homebound individuals 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	On Lok Day Services
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).
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
DAAS	Department of Adult and Aging 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 older individual who is either: (a) unable to perform at least two ADL or IADL 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	Home-delivered meals are provided to individuals who are homebound by reason of illness, incapacitating disability, isolation, lack of support network and have no safe, healthy alternative for meals, and 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. Service recipients must have a home visit reassessment by their service providers at least every other quarter.
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
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 DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, iron, zinc, magnesium, vitamin A, vitamin C, vitamin D, vitamin E, niacin, riboflavin, thiamine, folic acid, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, 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 project 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 project 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.
Nutrition Education	The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. Handouts material may be used as the sole nutrition education component for the home-delivered meal participants. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. Nutrition education activities shall be provided on a quarterly basis and documented. One service unit is defined as one nutrition education unit provided to one participant.
OOA	Office on the 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.

Low-Income	100% 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.
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 counseling by a Registered Dietitian to HDM consumers who are receiving special diets.
Registered Dietitian	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.
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. http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

The target population is resident of San Francisco County, aged 60 and above. OOA specifically 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, an individual must meet the following criteria:

1. A senior, age 60 or above, who is frail and homebound by reason of illness, disability, isolation, lack of support network and have no safe, healthy alternative for meals.
2. A spouse ,domestic partner of a person in subsection (IV)(1) above, regardless of age or condition, if an assessment concludes that it is in the best interest of the homebound older individual.
3. An individual with a disability who resides at home with older individuals if an assessment concludes that it is in the best interest of the homebound older individual who participates in the program.
4. Priority shall be given to older individuals in (IV)(1) above.

V. Services to be Provided

- A. Develop and maintain current home-delivered meal policies and procedures with the approval of OOA Nutritionist to meet the nutrition, food service, eligibility assessment and dietary counseling standards that ensure the provision of quality meals, adequate access to sound nutrition information enabling participants 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 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 delivered to neighborhoods as indicated on the DAAS-OOA approved Site Chart. Each meal shall meet the CDA and OOA menu requirements.
 - 3. Conduct annual comprehensive assessment and quarterly eligibility re-evaluation of each participant according to the OOA standards as specified in its policy manual. The comprehensive assessment and at least one re-evaluation must be completed at the home of the participant.
 - 4. 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 by the 5th working day of the month for the preceding month.
 - 5. Conduct nutrition risk screening annually for each participant and enter data in to CA-GetCare within one month of obtaining the participant's nutrition risk status.
 - 6. A suggested donation per meal requested of each participant must be approved by the Grantee's Board of Directors and OOA in advance.
- 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 must be conducted on site and documented at least three times a year by a R.D at each production kitchen and for each delivery route at least three times a year. Grantee with four or more delivery routes will conduct a HDM route monitoring at least once a month. 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 by the specified due dates.
- 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 by April 30 of each fiscal year. 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 either 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 mandatory quarterly in-service training coordinated and provided by the OOA. and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.

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>

VI. Service Objectives

- A. Grantee will serve the total number of 424 unduplicated consumers
- B. Grantee will serve the total number of 78,216 authorized meals
- C. Grantee will provide the total number of nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

- A. To provide quality meals that attains a high satisfaction level from participants. At least 85% will be satisfied with the meal quality.
- B. To provide quality services that attains a high satisfaction level from participants. At least 85% of participants are satisfied with the service delivery by staff and/or volunteers.
- C. To provide a nutritious meal that contributes to the participant's nutritional well-being. At least 75% of the participants indicate that they benefited from participating in the nutrition program by improving their food security or overall health.
- D. To provide access to sound nutrition information that increases participants' nutrition knowledge and awareness. At least 65% of the participants who receive nutrition education indicate that they have learned to make healthier food choice and/or learned to improve safe food handling practices.

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant 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, hours of operation are current according to the 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 the consumer data including the Intake Form, and the Nutrition Risk Screening form by the due date as specified by the OOA. At least 85% of

enrolled clients should receive annual nutrition risk screening and 95% or more will receive ADL/IADL annual screening.

- B. Grantee will enter into CA-GetCare all the client level service units in the Service Recording Tool by the 5th 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. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
 - The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicate that they have learned to make healthier food choices and/or learned to improve safe food handling practices.
- E. 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.
- F. Grantee will develop and maintain an updated Site Chart approved by OOA. A copy of the updated Site Chart will be kept in OOA's contractor program file F. Grantee will provide other reports as requested.
- G. 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, all other reports should be sent to the following addresses:

Tahir Shaikh
Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Tahir.Shaikh@sfgov.org

Tiffany Kearney, RD
Nutritionist/OOA
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Tiffany.Kearney@sfgov.org

	A	B	C	D
1	BUDGET FORMS			Appendix B2, pg. 1
2	Document Date: 6/3/2016			
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADU			
4	BUDGET PROPOSAL FORMS			
5	Grantee's Name: On Lok Day Services			Grant Term
6	(Check One) New <input checked="" type="checkbox"/> Renewal ___ Modification ___			
7	Effective Date of Mod: 7/1/16		No. of Mod:	7/1/16 to 6/30/17
8	Program: HDM-ENP			TOTAL
9	Annual #Meals Contracted	78,216		78,216
10	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17
11	DAAS Expenditures			
12	Salaries & Benefits	\$134,774		\$134,774
13	Operating Expense	\$341,612		\$341,612
14	Subtotal	\$476,386		\$476,386
15	Indirect Percentage (max 10%)	9%		\$0
16	Indirect Cost (Line 14 X Line 13)	\$42,875		\$42,875
17	Capital Expenditure	\$0		\$0
18	TOTAL DAAS EXPENDITURES	\$519,261		\$519,261
19				
20	Non-DAAS Expenditures			
21	Salaries & Benefits	\$57,760		\$57,760
22	Operating Expense	\$180,689		\$180,689
23	Capital Expenditure	\$0		\$0
24	TOTAL Non-DAAS EXPENDITURES	\$238,449		\$238,449
25				
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$757,710		\$757,710
27				
28	HSA-DAAS Revenues			
29	Meals	514,568		\$514,568
30	Add Back NOFA 663	\$4,693		\$4,693
31				\$0
32				\$0
33				\$0
34	TOTAL HSA-DAAS REVENUES	\$519,261		\$519,261
35	PER MEAL COST, HSA-DAAS	\$6.64		\$6.64
36	Non-DAAS Revenues			
37	Project Income	82,127		\$82,127
38	Agency Cash - Fundraising	\$156,323		\$156,323
39	Agency In-Kind Volunteer	\$0		\$0
40				
41				
42				
43	TOTAL NON HSA-DAAS REVENUES	\$238,449		\$238,449
44	PER MEAL COST, NON HSA-DAAS	\$3.05		\$3.05
45	TOTAL REVENUES	\$757,710		\$757,710
46	PER MEAL COST, TOTAL	\$9.69		\$9.69
47	Full Time Equivalent (FTE)	0.00		0.00
49	Prepared by: Valorie Villela - Director Phone No.: (415) 550-2211			
50	HSA-CO Review Signature: _____			Date: _____
51	HSA #1 (11/14/13)			

	A	B	C	D	E	F	G	H
1	Grantee's Name: On Lok Day Services						Appendix B2, page 2	
2	Program Name:						Date: 6/3/16	
3	HDM-ENP							
4								
5								
6								
7								
8	H.S.A-DAAS							
		Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17		TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/16 to 6/30/17
10	ACCOUNTANT	\$43,930	100%	20%	20%	\$8,918		\$8,918
11	ADMINISTRATIVE SECRETARY	\$62,504	100%	6%	6%	\$3,500		\$3,500
12	ASSISTANT DIRECTOR OF OPERATIONS	\$75,005	100%	9%	9%	\$6,825		\$6,825
13	DIRECTOR	\$131,560	100%	6%	6%	\$7,367		\$7,367
14	NUTRITION PROGRAM MANAGER	\$62,400	100%	2%	2%	\$1,365		\$1,365
15	NUTRITION PROGRAM COORDINATOR	\$35,360	100%	39%	39%	\$13,614		\$13,614
16	HDM ASSESSMENT ASSISTANT	\$41,600	40%	0%	0%	\$39		\$39
17	HOSPITALITY COORDINATOR	\$35,360	100%	14%	14%	\$4,950		\$4,950
18	DRIVERS (6)	\$27,536	383%	56%	213%	\$58,714		\$58,714
19								
20								
21								
22								
23	TOTALS	\$ 515,254	1123%	151%	309%	\$105,292		\$105,292
24								
25	FRINGE BENEFIT RATE	28.00%						
26	EMPLOYEE FRINGE BENEFITS	\$ 144,271				\$29,482		\$29,482
27								
28								
29	TOTAL DAAS SALARIES & BENEFITS	\$ 659,525				\$134,774		\$134,774
30								
31								
32	Non - DAAS	Agency Totals		For DAAS Meal				TOTAL
33	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/16 to 6/30/17
34	ACCOUNTANT	\$ 43,930	100%	0.09	9%	\$3,822		\$3,822
35	ADMINISTRATIVE SECRETARY	\$ 62,504	100%	2%	2%	\$1,500		\$1,500
36	ASSISTANT DIRECTOR OF OPERATIONS	\$ 75,005	100%	4%	4%	\$2,925		\$2,925
37	DIRECTOR	\$ 131,560	100%	2%	2%	\$3,157		\$3,157
38	NUTRITION PROGRAM MANAGER	\$ 62,400	100%	1%	1%	\$585		\$585
39	NUTRITION PROGRAM COORDINATOR	\$ 35,360	100%	17%	17%	\$5,834		\$5,834
40	HDM ASSESSMENT ASSISTANT	\$ 41,600	40%	0%	0%	\$17		\$17
41	HOSPITALITY COORDINATOR	\$ 35,360	100%	6%	6%	\$2,122		\$2,122
42	DRIVERS (6)	\$ 27,536	383%	24%	91%	\$25,163		\$25,163
43								
44								
45								
46								
47	TOTAL NON-DAAS	\$ 515,254		65%	132%	\$45,125		\$45,125
48								
49	FRINGE BENEFIT RATE	28%						
50	EMPLOYEE FRINGE BENEFITS	\$ 144,271				\$12,635		\$12,635
51								
52								
53	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 659,525				\$57,760		\$57,760
54								
55	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 1,319,050				\$192,535		\$192,535

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: On Lok Day Serv								Appendix B2, page 3
2	Program Name:								Date: 6/3/16
3	HDM-ENP								
4	Operating Expense Detail								
7	H.S.A-DAAS	Annual #Meals Contracted:	78,216						TOTAL
8	Expenditure Category	Term	7/1/16 to 6/30/17						7/1/16 to 6/30/17
9	Rental of Property								
10	Utilities(Elec, Water, Gas, Phone, Scavenger)								\$17,171
11	Office Supplies, Postage								\$1,817
12	Building Maintenance Supplies and Repair								\$21,389
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 \$ 3.52	\$275,389						\$275,389
18	CONSULTANT/SUBCONTRACTOR Descriptive Title								
19	Dietician Consultant								\$3,613
20	Consultant-Translator								
21	OTHER COSTS:								
22	Insurance								\$16,269
23	Staff Training & Travel								
24	Rental of Equipment								
25	Small Equipment (over \$500 but under \$5,000/item)								
26	Auto - Fuel & Insurance								\$3,356
27	Auto - Repair/Maintenance								
28	Printing								
29	Supplies and Minor Equipment								\$2,608
30	Payroll Processing								
31	Parking - Deliveries								
32									
33									
34									
35									
36	TOTAL DAAS OPERATING EXPENSE		\$341,612						\$341,612
38	Non-DAAS								TOTAL
39	Expenditure Category								
40	Rental of Property								
41	Utilities(Elec, Water, Gas, Phone, Scavenger)								\$8,823
42	Office Supplies, Postage								\$934
43	Building Maintenance Supplies and Repair								\$10,990
44	FOOD COSTS								
45	Raw Food	per meal							
46	Cong Food Svc Supplies	per meal							
47	HDM Food Svc Supplies	per meal							
48	Catered Meals	per meal \$ 1.81	\$141,502						\$141,502
49	CONSULTANT/SUBCONTRACTOR Descriptive Title								
50	Dietician Consultant								\$1,857
51	Consultant-Translator								\$300
52	OTHER COSTS:								
53	Insurance								\$8,359
54	Staff Training & Travel								\$480
55	Rental of Equipment								\$1,748
56	Small Equipment (over \$500 but under \$5,000/item)								
57	Auto - Fuel & Insurance								\$1,724
58	Auto - Repair/Maintenance								\$952
59	Printing								\$270
60	Supplies and Minor Equipment								\$1,340
61	Payroll Processing								\$410
62	Parking - Deliveries								\$1,000
63									
64									
65									
66									
67									
68	TOTAL Non-DAAS OPERATING EXPENSE		\$180,689						\$180,689
69									
70	TOTAL DAAS & Non-DAAS OPERATING EXPENSE		\$522,301						\$522,301

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

	Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
Nutrition Education:				
Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM	4	147.15	147.15	0
Nutrition Counseling:				
Annual #hours to be provided	80	140.92	71.75	69.17
Annual #sessions to be provided				
HCCP Kitchen Monitoring (1 unit = 1 session completed)				
	1.5	882.90	882.90	0
Site/Route Monitoring (1 unit = 1 session completed):				
	12	237.62	237.62	0
Menu Planning & Analysis (1 unit = 1 set menu completed)				
	1	1,162.57	1,000.03	162.54
HDM Assessment (1 units = annual intake assessment & reassessment completed)				
	305	206.32	206.32	0
OTHER Nutrition Compliance:				
In-service training to staff/volunteers (1 unit =1 hour)	5	41.86	41.86	0
Attend Mandatory OOA Quarterly Meeting (1 unit = 1 hour)	5	41.86	41.86	0

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:

Home Delivered Meals

- Nutrition Education: 1 session proposed for each of 4 quarters. Includes yearly plan and review of all nutrition education provided on monthly menu
- HCCP Kitchen Monitoring: 1.5 units proposed (.5 unit for 3 quarters, DAAS/OOA annual monitoring is used for 4th quarter)
- Route Monitoring: 12 units proposed (2 each for 6 routes, DAAS/OOA annual monitoring used for 3rd requirement)
- Menu Planning and Analysis: 1 unit proposed for annual HDM portion of program
- HDM Assessment: 305 units proposed for initial/annual comprehensive assessments as well as quarterly reassessments (1 unit=5.5 hours per HDM client)
- In-Service Training: 5 hours proposed for HDM portion of mandatory meetings

	A	B	C	D	E
1	Appendix B3, Page 1				
2	Document Date: 6/3/2016				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Contractor Name			Term	
6	On Lok Day Services			July 1, 2016 to June 30, 2017	
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Nutrition Compliance for ENP-HDM		REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits	\$0	\$0	\$0	\$0
15	Operating Expense	\$540	\$540	\$0	\$540
16	Subtotal Direct	\$540	\$540	\$0	\$540
17	Indirect Percentage	9.0%	9.0%		
18	Indirect Expense	\$49	\$49	\$0	\$49
19	Total Nutrition Education	\$589	\$589	\$0	\$589
20	Nutrition Counseling				
21	Salaries & Benefits	\$0	\$0	\$0	\$0
22	Operating Expense	\$10,800	\$5,266	\$5,534	\$10,800
23	Subtotal Direct	\$10,800	\$5,266	\$5,534	\$10,800
24	Indirect Percentage	4.4%	9.0%		
25	Indirect Expense	\$474	\$474	\$0	\$474
26	Total Nutrition Counseling	\$11,274	\$5,740	\$5,534	\$11,274
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits	\$0	\$0	\$0	\$0
29	Operating Expense	\$1,215	\$1,215	\$0	\$0
30	Subtotal Direct	\$1,215	\$1,215	\$0	\$1,215
31	Indirect Percentage	9.0%	9.0%		
32	Indirect Expense	\$109	\$109	\$0	\$109
33	Total HCCP Kitchen Monitoring	\$1,324	\$1,324	\$0	\$1,324
34	Site/Route Monitoring				
35	Salaries & Benefits	\$1,536	\$1,536	\$0	\$1,536
36	Operating Expense	\$1,080	\$1,080	\$0	\$1,080
37	Subtotal Direct	\$2,616	\$2,616	\$0	\$2,616
38	Indirect Percentage	9.0%	9.0%		
39	Indirect Expense	\$235	\$235	\$0	\$235
40	Total Site/Route Monitoring	\$2,851	\$2,851	\$0	\$2,851
41	Menu Planning				
42	Salaries & Benefits	\$0	\$0	\$0	\$0
43	Operating Expense	\$1,080	\$917	\$163	\$1,080
44	Subtotal Direct	\$1,080	\$917	\$163	\$1,080
45	Indirect Percentage	7.6%	9.0%		
46	Indirect Expense	\$83	\$83	\$0	\$83
47	Total Menu Planning	\$1,163	\$1,000	\$163	\$1,163
48	HDM Assessments				
49	Salaries & Benefits	\$56,832	\$56,832	\$0	\$56,832
50	Operating Expense	\$900	\$900	\$0	\$900
51	Subtotal Direct	\$57,732	\$57,732	\$0	\$57,732
52	Indirect Percentage	9.0%	9.0%		
53	Indirect Expense	\$5,196	\$5,196	\$0	\$5,196
54	Total HDM Assessments	\$62,928	\$62,928	\$0	\$62,928
55	Other Nutrition Compliance				
56	Salaries & Benefits	\$192	\$192	\$0	\$192
57	Operating Expense	\$0	\$0	\$0	\$0
58	Subtotal Direct	\$192	\$192	\$0	\$192
59	Indirect Percentage	9.0%	9.0%		
60	Indirect Expense	\$17	\$17	\$0	\$17
61	Total Other Nutrition Compliance	\$209	\$209	\$0	\$209
62	GRAND Total Expenditures	\$80,338	\$74,642	\$5,696	\$80,338
63	HSA Revenues		\$74,642		\$74,642
64					
65					
66	TOTAL HSA REVENUES		\$74,642		\$74,642
67	Other Non-H.S.A.-DAAS Revenues			\$5,696	\$5,696
68	Agency Cash - Fundraising				
69					
70					
71	TOTAL OTHER REVENUES			\$5,696	\$5,696
72	Full Time Equivalent (FTE)	0.92	0.90	0.02	0.92
74	Prepared by: Valorie Villela - Director	Telephone No.: (415) 550-2211		Date: 6/3/16	
75	HSA-CO Review Signature: _____				
76	HSA #1				

Program Name: ENP HDM Nutrition Compliar
(Same as Line 9 on HSA #1)

HCCP Kitchen Monitoring Operating Expense Detail

Expenditure Category	TERM 7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
Registered Dietician	\$1,215	\$1,215	\$0	\$1,215
OTHER				
TOTAL OPERATING EXPENSE	\$1,215	\$1,215	\$0	\$1,215
HSA #3				

Program Name: ENP HDM Nutrition Compliance
(Same as Line 9 on HSA #1)

Menu Planning Operating Expense Detail

Expenditure Category	7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
Registered Dietician	\$1,080	\$917	\$163	\$1,080
OTHER				
TOTAL OPERATING EXPENSE	\$1,080	\$917	\$163	\$1,080

HSA #3

Program Name: ENP HDM Nutrition Compliance
(Same as Line 9 on HSA #1)

Annual & Quarterly HDM Intake & Assessment Salaries & Benefits Detail

7/1/16-6/30/17

POSITION TITLE	Agency Totals		For HSA Program		For DHS Program Budgeted Salary	REVENUE Cost Allocation:		Total Revenue
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE		H.S.A.-DAAS	Non-HSA-DAAS	
HDM ASSESSMENT ASSISTANT	\$41,600	40%	99.16%	40%	\$16,500	\$16,500	\$0	\$16,500
NUTRITION PROGRAM MANAGER	\$62,400	100%	44.71%	45%	\$27,900	\$27,900	\$0	\$27,900
TOTALS	\$104,000	1.40	1.44	0.84	\$44,400	\$44,400	\$0	\$44,400
FRINGE BENEFIT RATE	28%							
EMPLOYEE FRINGE BENEFITS	\$29,120				\$12,432	\$12,432	\$0	\$12,432
TOTAL SALARIES & BENEFITS	\$133,120				\$56,832	\$56,832	\$0	\$56,832

HSA #2

Program Name: ENP HDM Nutrition Compliance
 (Same as Line 9 on HSA #1)

HDM Assessment Operating Expense Detail

Expenditure Category	TERM 7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel	\$900	\$900	\$0	\$900
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
TOTAL OPERATING EXPENSE	\$900	\$900	\$0	\$900
HSA #3				

