



**MEMORANDUM**

**TO:** AGING & ADULT SERVICES COMMISSION

**THROUGH:** SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

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

**DATE:** JUNE 7, 2017

**SUBJECT:** NEW GRANTS/CONTRACT: **MULTIPLE GRANTEES/CONTRACTOR for NUTRITION SERVICES for SENIORS AND ADULTS WITH DISABILITIES (see table below)**

**GRANT/CONTRACT TERM:** For all grants/contracts, term is 7/1/17-6/30/20, with the exception of the Food Assistance Program which has a term of 7/1/17-6/30/22

**GRANT/CONTRACT AMOUNT:** See table below

<u>FUNDING SOURCE</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>MOD FUNDING:</b>	\$44,045,892	\$1,087,553	\$9,244,199	\$5,437,764	\$59,815,408
<b>PERCENTAGE:</b>	81%	2%	17%		100%

The Department of Aging and Adult Services requests authorization to enter into new grant/contract agreements with multiple providers for the provision of nutrition services to seniors and adults with disabilities (AWD) in an annual combined amount of \$17,501,118. The term of the grants/contracts will be from July 1, 2017 to June 30, 2020, with the exception of the Food Assistance Program, which has a five-year term of July 1, 2017 to June 30, 2022. The total of the new grant/contract amounts plus a 10% contingency will not exceed \$59,815,408. The funding amounts are detailed in the tables below (pages 3-5).

**Background**

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

independence. DAAS has provided ENP services since 1975. The ENP managed by the department is the largest elderly community nutrition services program in San Francisco. Besides ENP programs, included are other locally funded nutrition programs such as Home-Delivered Grocery, Food Assistance Programs, and citywide nutrition counseling and education services to help seniors and adults with disabilities to access more healthy food and enable them to live more independently in the community, improve their well-being and reduce social isolation.

### **Services to be Provided**

Grantees will provide various types of hot meals at congregate meal sites strategically located in different neighborhoods, as well as deliver hot, chilled and frozen meals to the homes of eligible individuals throughout the City; Grantees/Contractor will provide nutrition compliance services to meet the Title III-C and DAAS nutrition program requirements. The ENP meals service provision is regulated by California Retail Food Code (CRFC), Occupational Safety and Health Administration (OSHA) Code, and requirements stipulated in California Code of Regulations Title 22 Division 1.8 and Older Americans Act. The San Francisco ENP and non-ENP programs also follow Office on the Aging nutrition standards. The target populations are eligible residents of San Francisco, aged 18 and above.

- **Congregate meals for seniors:** Provides mostly lunch but also breakfast and dinner for seniors (age 60 and above) at congregate meal sites scattered across the city. Additionally, there are three restaurant model meals sites, called CHAMPSS (Choosing Healthy and Appetizing Meal Plan Solutions for Seniors). The meals providers collectively cover multiple cultural cuisines and serve food daily; a smaller number of sites are open on weekends. Congregate meal services not only afford consumers optimal nutritional intake, but also provide a space for seniors and adults with disabilities to socialize and be active during the day. Per state-mandated requirements, DAAS meals providers must also receive regular kitchen monitoring, and offer a number of nutrition education sessions for the program participants each year. These services are delivered either by the provider itself, through an in-kind partnership with City College of San Francisco's Adult Education Program, through an independent nutritionist contractor, or through the citywide nutrition education contractors.
- **Congregate meals for adults with disabilities (AWD):** Congregate meal sites in focused areas specializing in meals serving adults with disabilities. Of the thirteen providers who serve congregate meals to seniors, seven of them provide congregate meals to both seniors and adults with disabilities.
- **Home-Delivered Meals (HDM) service to seniors:** Seniors who are non-ambulatory for various reasons, and meet the HDM eligibility requirements will be able to receive meals delivered to them in their homes. These meals hold the same nutritional value as those served at the congregate sites. The number of meals delivered to each consumer per week depends on their unique needs. Meals eligibility assessments are performed by the HDM provider and are included in each provider's Nutrition Compliance budget.
- **HDM service to adults with disabilities (AWD):** Adults with disabilities who are non-ambulatory and meet the HDM eligibility requirements are eligible to receive home-

delivered meals. Eligibility assessments and follow-ups for consumers of any AWD HDM provider are centrally performed by one grantee.

- **Emergency HDM service:** Provides Emergency HDM services to consumers in urgent need of sustenance within 2-5 days after Emergency HDM eligibility has been approved by DAAS Integrated Intake. Currently, there is one sole provider for Emergency HDM.
- **Food Assistance Program:** Provides food to low-income seniors and adults with disabilities by means of authorized community-based food distribution centers, pantries, and home-delivered grocery partners. Currently, there is one sole source provider for the Food Assistance Program for a term of five years.

**ENP Congregate Meals**

Agency	Annual Award Amount	Fiscal Year (FY) 17-20 Total Amount	10% Contingency	FY 17-20 Total Not-To-Exceed Amount
Bayview Hunters Point Multipurpose Senior Services	\$486,669	\$1,460,006	\$146,001	\$1,606,007
Centro Latino de San Francisco	\$327,820	\$983,460	\$98,346	\$1,081,806
Episcopal Community Services	\$188,007	\$564,021	\$56,402	\$620,423
Glide	\$137,272	\$411,816	\$41,182	\$452,998
Kimochi	\$463,684	\$1,391,052	\$139,105	\$1,530,157
On Lok Day Services	\$556,213	\$1,668,639	\$166,864	\$1,835,503
Project Open Hand	\$1,799,049	\$5,397,147	\$539,715	\$5,936,862
Russian American Community Services	\$215,060	\$645,180	\$64,518	\$709,698
Self-Help for the Elderly	\$2,012,909	\$6,038,727	\$603,873	\$6,642,600
Candace Tang	\$13,800	\$41,400	\$4,140	\$45,540
Leah's Pantry (Nutrition Compliance)	\$30,414	\$91,242	\$9,124	\$100,366
Leah's Pantry: Citywide Nutrition Counseling & Education	\$33,570	\$100,710	\$10,071	\$110,781
Project Open Hand: Citywide Nutrition Counseling & Education	\$41,033	\$123,099	\$12,310	\$135,409
<b>Total</b>	<b>\$6,305,500</b>	<b>\$18,916,499</b>	<b>\$1,891,650</b>	<b>\$20,808,149</b>

**AWD Congregate Meals**

Agency	Annual Award Amount	Fiscal Year (FY) 17-20 Total Amount	10% Contingency	FY 17-20 Total Not-To-Exceed Amount
Bayview Hunters Point Multipurpose Senior Services	\$90,399	\$271,198	\$27,120	\$298,318

Agency	Annual Award Amount	Fiscal Year (FY) 17-20 Total Amount	10% Contingency	FY 17-20 Total Not-To-Exceed Amount
Centro Latino de San Francisco	\$37,513	\$112,539	\$11,254	\$123,793
Episcopal Community Services	\$26,157	\$78,471	\$7,847	\$86,318
Glide	\$50,830	\$152,490	\$15,249	\$167,739
Project Open Hand	\$173,898	\$521,694	\$52,169	\$573,863
Russian American Community Services	\$5,415	\$16,245	\$1,625	\$17,870
Self-Help for the Elderly	\$21,738	\$65,214	\$6,521	\$71,735
<b>Total</b>	<b>\$405,950</b>	<b>\$1,217,851</b>	<b>\$121,785</b>	<b>\$1,339,636</b>

**ENP Home-Delivered Meals**

Agency	Annual Award Amount	Fiscal Year (FY) 17-20 Total Amount	10% Contingency	FY 17-20 Total Not-To-Exceed Amount
Candace Tang	\$12,450	\$37,350	\$3,735	\$41,085
Centro Latino de San Francisco	\$231,196	\$693,588	\$69,359	\$762,947
Jewish Family & Children's Services	\$86,502	\$259,506	\$25,951	\$285,457
Kimochi	\$261,777	\$785,331	\$78,533	\$863,864
Meals on Wheels	\$5,633,364	\$16,900,092	\$1,690,009	\$18,590,101
On Lok Day Services	\$629,124	\$1,887,372	\$188,737	\$2,076,109
Russian American Community Services	\$247,592	\$742,776	\$74,278	\$817,054
Self-Help for the Elderly	\$533,336	\$1,600,008	\$160,001	\$1,760,009
<b>Total</b>	<b>\$7,635,341</b>	<b>\$22,906,023</b>	<b>\$2,290,602</b>	<b>\$25,196,625</b>

**AWD Home-Delivered Meals**

Agency	Annual Award Amount	Fiscal Year (FY) 17-20 Total Amount	10% Contingency	FY 17-20 Total Not-To-Exceed Amount
Meals on Wheels	\$772,314	\$2,316,942	\$231,694	\$2,548,636
Project Open Hand	\$90,270	\$270,810	\$27,081	\$297,891
Self-Help for the Elderly	\$190,421	\$571,263	\$57,126	\$628,389
Institute on Aging	\$296,000	\$888,000	\$88,800	\$976,800
<b>Total</b>	<b>\$1,349,005</b>	<b>\$4,047,015</b>	<b>\$404,702</b>	<b>\$4,451,717</b>

**Home-Delivered Meals Emergency**

Agency	Annual Award Amount	Fiscal Year (FY) 17-20 Total Amount	10% Contingency	FY 17-20 Total Not-To-Exceed Amount
Meals on Wheels	\$140,000	\$420,000	\$42,000	\$462,000
<b>Total</b>	<b>\$140,000</b>	<b>\$420,000</b>	<b>\$42,000</b>	<b>\$462,000</b>



**Home-Delivered Groceries**

Agency	Annual Award Amount	Fiscal Year (FY) 17-20 Total Amount	10% Contingency	FY 17-20 Total Not-To-Exceed Amount
Community Living Campaign	\$181,067	\$543,201	\$54,320	\$597,521
Golden Gate Senior Services	\$144,966	\$434,898	\$43,490	\$478,388
SF-Marin Food Bank	\$402,144	\$1,206,432	\$120,643	\$1,327,075
<b>Total</b>	<b>\$728,177</b>	<b>\$2,184,531</b>	<b>\$218,453</b>	<b>\$2,402,984</b>

**Food Assistance Program (5-yr term)**

Agency (Sole Source)	Annual Award Amount	Fiscal Year (FY) 17-22 Total Amount	10% Contingency	FY 17-22 Total Not-To-Exceed Amount
SF-Marin Food Bank	\$937,145	\$4,685,725	\$468,573	\$5,154,298
<b>Total</b>	<b>\$937,145</b>	<b>\$4,685,725</b>	<b>\$468,573</b>	<b>\$5,154,298</b>

**Selection**

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

**Funding**

These grants will be funded entirely through a combination of Federal, State, and County funds.

**ATTACHMENTS**

**ENP Congregate Meals:**

Bayview Hunters Point Multi-Purpose Senior Services

Appendix A – Services to be Provided

Appendix B – Budget

Appendix B-1 – Budget Nutrition Compliance

Centro Latino de San Francisco

Appendix A – Services to be Provided

Appendix B – Budget

Episcopal Community Services

Appendix A – Services to be Provided

Appendix B – Budget

Appendix Ba – Budget Nutrition Compliance

Glide Foundation

Appendix A – Services to be Provided

Appendix B – Budget

Kimochi, Inc.

Appendix A – Services to be Provided

Appendix B – Budget

Appendix B1 – Budget Nutrition Compliance

On Lok Day Services

Appendix A – Services to be Provided

Appendix B – Budget

Appendix B1 – Budget Nutrition Compliance

Project Open Hand

Appendix A – Services to be Provided

Appendix B – Budget

Appendix Ba – Budget (Breakfast)

Appendix Ba-2 – Budget Nutrition Compliance

Russian American Community Services

Appendix A – Services to be Provided

Appendix B – Budget

Self-Help for the Elderly

Appendix A – Services to be Provided

Appendix B – Budget

Appendix B1 – Budget CHAPMSS

Appendix B2 – Budget Nutrition Compliance

Candace Tang

Appendix A – Services to be Provided ENP Congregate Meals and HDM NCQA

Appendix B – Budget ENP Nutrition Compliance

Leah's Pantry

Appendix A – Services to be Provided Citywide Nutrition Education & Counseling Services for Congregate and Home-Delivered Meals Programs

Appendix B – Budget Citywide Nutrition Education & Counseling Compliance

Appendix B-a – Budget Home Delivered Meals Nutrition Compliance

Project Open Hand

Appendix A-4 – Services to be Provided Nutrition Education & Counseling Services for Congregate and Home-Delivered Meals Programs

Appendix B4 – Budget

**AWD Congregate Meals:**

Bayview Hunters Point Multi-Purpose Senior Services

Appendix A-1 – Services to be Provided

Appendix B-1 – Budget

Centro Latino de San Francisco  
Appendix A2 – Services to be Provided  
Appendix B3 – Budget

Episcopal Community Services  
Appendix A-2 – Services to be Provided  
Appendix B-2 – Budget

Glide Foundation  
Appendix A-2 – Services to be Provided  
Appendix B-2 – Budget

Project Open Hand  
Appendix A-2 – Services to be Provided  
Appendix B2 – Budget

Russian American Community Services  
Appendix A-2 – Services to be Provided  
Appendix B2 – Budget

Self-Help for the Elderly  
Appendix A2 – Services to be Provided  
Appendix B5 – Budget

**ENP Home-Delivered Meals**

Candace Tang  
Appendix B-1 – Budget Home-Delivered Meals Nutrition Compliance

Centro Latino de San Francisco  
Appendix A1 – Services to be Provided  
Appendix B1 – Budget Home-Delivered Meals  
Appendix B2 – Budget Home-Delivered Meals Nutrition Compliance

Jewish Family and Children’s Services  
Appendix A – Services to be Provided  
Appendix B – Budget Home-Delivered Meals  
Appendix B-1 – Budget Home-Delivered Meals Nutrition Compliance

Kimochi, Inc.  
Appendix A1 – Services to be Provided  
Appendix B2 – Budget Home-Delivered Meals  
Appendix B3 – Budget Home-Delivered Meals Nutrition Compliance

Meals on Wheels of San Francisco  
Appendix A1 – Services to be Provided  
Appendix B1 – Budget Home-Delivered Meals

Appendix B2 – Budget Home-Delivered Meals Nutrition Compliance

On Lok Day Services

Appendix A1 – Services to be Provided

Appendix B2 – Budget Home-Delivered Meals

Appendix B3 – Budget Home-Delivered Meals Nutrition Compliance

Russian American Community Services

Appendix A-1 – Services to be Provided

Appendix B-1 – Budget Home-Delivered Meals

Appendix B-1a – Budget Home-Delivered Meals Nutrition Compliance

Self-Help for the Elderly

Appendix A1 – Services to be Provided

Appendix B3 – Budget Home-Delivered Meals

Appendix B4 – Budget Home-Delivered Meals Nutrition Compliance

**AWD Home-Delivered Meals**

Meals on Wheels of San Francisco

Appendix A2 – Services to be Provided

Appendix B3 – Budget

Project Open Hand

Appendix A-3 – Services to be Provided

Appendix B3 – Budget

Self-Help for the Elderly

Appendix A3 – Services to be Provided

Appendix B6 – Budget

Institute on Aging

Appendix A – Services to be Provided

Appendix B – Budget

**Home-Delivered Meals Emergency**

Meals on Wheels of San Francisco

Appendix A – Services to be Provided

Appendix B – Budget

**Home-Delivered Groceries**

Community Living Campaign

Appendix A – Services to be Provided

Appendix B – Budget

Golden Gate Senior Services

Appendix A – Services to be Provided

Appendix B – Budget

San Francisco-Marin Food Bank

Appendix A – Services to be Provided

Appendix B – Budget

**Food Assistance Program**

San Francisco-Marin Food Bank

Appendix A – Services to be Provided

Appendix B – Budget

**Appendix A - Services to be Provided**  
**Bayview Hunters Point Multipurpose Senior Services, Inc.**  
**Elderly Nutrition Program (ENP) Congregate Meals**  
**July 1, 2017 – June 30, 2020**

**I. Purpose**

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

**II. Definitions**

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



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

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

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

**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

B. Provide congregate meal services, which include:

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

Table A	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
=Unduplicated Consumers	1,935	1,935	1,935	5,805
=Meals	71,605	71,605	71,605	214,815

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

- program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis and no later than once per quarter.
- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
  - F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist as defined by OOA policy memoranda. The survey tool will be provided by OOA on an annual basis.
  - G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use reusable, biodegradable, compostable and/or recyclable food service supplies.
  - H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
  - I. The Grantee will attend the quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
  - J. The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
  - K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.  
<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

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

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

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

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

## VIII. Monitoring Activities

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

## IX. Reporting Requirements

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

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

Elena Baranoff (Worker #GB24)  
Senior Contract Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120  
[Elena.Baranoff@sfgov.org](mailto:Elena.Baranoff@sfgov.org)

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



	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>					Appendix B, pg. 1
2	Document Date:					1/19/2017
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: Bayview Hunters Point Senior Svcs				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)	ENP	ENP	ENP	TOTAL	Average cost/meal
9	<b>Annual #Meals Contracted</b>	71,605	71,605	71,605	214,815	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>					
12	Salaries & Benefits	\$255,698	\$255,698	\$255,698	\$767,095	\$3.57
13	Operating Expense	\$224,771	\$224,771	\$224,771	\$674,312	\$3.14
14	<b>Subtotal</b>	<b>\$480,469</b>	<b>\$480,469</b>	<b>\$480,469</b>	<b>\$1,441,406</b>	<b>\$6.71</b>
15	Indirect Percentage (max 10%)					
16	Indirect Cost.(Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)					
17	Capital Expenditure					
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$480,469</b>	<b>\$480,469</b>	<b>\$480,469</b>	<b>\$1,441,406</b>	<b>\$6.71</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits	\$148,720	\$148,720	\$148,720	\$446,160	\$2.08
22	Operating Expense	\$3,515	\$3,515	\$3,515	\$10,545	\$0.05
23	Capital Expenditure					
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$152,235</b>	<b>\$152,235</b>	<b>\$152,235</b>	<b>\$456,705</b>	<b>\$2.13</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$632,704</b>	<b>\$632,704</b>	<b>\$632,704</b>	<b>\$1,898,111</b>	<b>\$8.84</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals	\$480,469	\$480,469	\$480,469	\$1,441,406	
30	Nutrition Compliance (if your agency is requesting funds)	\$6,200	\$6,200	\$6,200	\$18,600	
31						
32						
33						
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$486,669</b>	<b>\$486,669</b>	<b>\$486,669</b>	<b>\$1,460,006</b>	
35	PER MEAL COST, HSA-DAAS	\$6.71	\$6.71	\$6.71	\$6.71	
36	Per MEAL & COMPLIANCE COST	\$6.80	\$6.80	\$6.80	\$6.80	
37	<b>Non-DAAS Revenues</b>					
38	Project Income	42,963	42,963	42,963	\$128,889	\$0.60
39	Agency Cash - Fundraising	\$36,454	\$36,454	36,454	\$109,362	\$0.51
40	Agency In-Kind Volunteer	\$72,800	\$72,800	\$72,800	\$218,400	\$1.02
41	Nutrition Compliance Revenues					
42						
43	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$152,217</b>	<b>\$152,217</b>	<b>\$152,217</b>	<b>\$456,651</b>	
44	PER MEAL COST, NON HSA-DAAS	\$2.13	\$2.13	\$2.13	\$2.13	
45	<b>TOTAL REVENUES</b>	<b>\$638,886</b>	<b>\$638,886</b>	<b>\$638,886</b>	<b>\$1,916,657</b>	
46	PER MEAL COST, TOTAL	\$8.92	\$8.92	\$8.92	\$8.92	
47	Full Time Equivalent (FTE)					
49	Prepared by: Justin Cheung	Phone No.: 415-822-1444		Date: 1/19/17		
50	HSA-CO Review Signature:				Date: _____	
51	HSA #1	Form Rev. 12/22/16				

	A	B	C	D	E	F	G	H	I	J	
1	Grantee's Name: Bayview Hunters Point Senior Svcs							Appendix B, page 2			
2	Program Name:							Date: 1/19/17			
3	ENP										
4											
5	<b>Salaries &amp; Benefits Detail</b>										
6											
7											
8	<b>H.S.A-DAAS</b>								<b>TOTAL</b>		
		Agency Totals		For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary		
10	Head Chef	\$52,000	100%	75%	75%	\$39,000	\$39,000	\$39,000	\$117,000		
11	Cook	\$44,990	100%	50%	50%	\$22,495	\$22,495	\$22,495	\$67,486		
12	Driver	\$30,576	100%	50%	50%	\$15,288	\$15,288	\$15,288	\$45,864		
13	Site Mgmt - Rosa Park	\$31,200	100%	50%	50%	\$15,600	\$15,600	\$15,600	\$46,800		
14	Site Mgt - WASC	\$31,200	100%	50%	50%	\$15,600	\$15,600	\$15,600	\$46,800		
15	Food Service Mgr/ Site Mgt	\$45,094	100%	64%	64%	\$28,861	\$28,861	\$28,861	\$86,583		
16	Kitchen Assistant-Dr. Davis	\$31,200	100%	75%	75%	\$23,400	\$23,400	\$23,400	\$70,200		
17	Cook - Weekend	\$ 41,600	100%	40%	40%	\$16,640	\$16,640	\$16,640	\$49,920		
18	Kitchen Assistant-WASC	\$30,160	100%	75%	75%	\$22,620	\$22,620	\$22,620	\$67,860		
19	Data Manager	\$33,280	100%	50%	50%	\$5,054	\$5,054	\$5,054	\$15,163		
20											
21	<b>TOTALS</b>	\$ 371,301	1000%	504%	504%	\$204,559	\$204,559	\$204,559	\$613,676		
22											
23	FRINGE BENEFIT RATE	25.0%									
24	EMPLOYEE FRINGE BENEFITS	\$ 92,825				\$51,140	\$51,140	\$51,140	\$153,419		
25											
26											
27	<b>TOTAL DAAS SALARIES &amp; BENEFITS</b>	\$ 464,126				\$255,698	\$255,698	\$255,698	\$767,095		
28											
29											
30	<b>Non - DAAS</b>								<b>TOTAL</b>		
		Agency Totals		For DAAS Meal							
31	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	Budgeted Salary		
32	Meal site & kitchen volunteers	\$ 29,120	100%	100%	100%	\$29,120	\$29,120	\$29,120	\$87,360		
33	Meal site & kitchen volunteers	\$ 29,120	100%	100%	100%	\$29,120	\$29,120	\$29,120	\$87,360		
34	Dietician	\$124,800	100%	13%	13%	\$15,600	\$15,600	\$15,600	\$46,800		
35	Site Mgt - Weekends WASC	\$33,280	100%	30%	30%	\$9,984	\$9,984	\$9,984	\$29,952		
36	Kitchen Assistant - Weekends	\$33,280	100%	40%	40%	\$13,312	\$13,312	\$13,312	\$39,936		
37	Janitorial/ Driver - Weekends	\$31,200	100%	20%	20%	\$6,240	\$6,240	\$6,240	\$18,720		
38	Kitchen Assistant -Dr Davis	\$33,280	100%	25%	25%	\$8,320	\$8,320	\$8,320	\$24,960		
39	Accounting	\$72,800	100%	10%	10%	\$7,280	\$7,280	\$7,280	\$21,840		
40											
41											
42											
43											
44											
45											
46											
47											
48											
49	<b>TOTAL NON-DAAS</b>	\$ 386,880	800%	338%	338%	\$118,976	\$118,976	\$118,976	\$356,928		
50											
51	FRINGE BENEFIT RATE	25.0%									
52	EMPLOYEE FRINGE BENEFITS	\$ 96,720				\$29,744	\$29,744	\$29,744	\$89,232		
53											
54											
55	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 483,600				\$148,720	\$148,720	\$148,720	\$446,160		
56											
57	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 947,726				\$404,418	\$404,418	\$404,418	\$1,213,255		
58	<b>HSA #2</b>	Form Rev. 12/22/16									

	A	B	C	D	E	F	G	H
1	Grantee's Name: Bayview Hunters							Appendix B, page 3
2	Program Name:							Date: 1/19/17
3	ENP							
4								
5								
6	<b>Operating Expense Detail</b>							
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	71,605	71,605	71,605	<b>TOTAL</b>		
8	<u>Expenditure Category</u>	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property		\$9,000	\$9,000	\$9,000	\$27,000		
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$12,000	\$12,000	\$12,000	\$36,000		
11	Office Supplies, Postage		\$1,056	\$1,056	\$1,056	\$3,168		
12	Building Maintenance Supplies and Repair		\$2,400	\$2,400	\$2,400	\$7,200		
13	<b>FOOD COSTS</b>							
14	Raw Food	per meal \$ 2.50	\$179,013	\$179,013	\$179,013	\$537,038		
15	Cong Food Svc Supplies	per meal \$ 0.20	\$14,321	\$14,321	\$14,321	\$42,963		
16	HDM Food Svc Supplies	per meal \$ -						
17	Catered Meals	per meal \$ -						
18	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
19								
20								
21	<b>OTHER COSTS:</b>							
22	Insurance		\$3,000	\$3,000	\$3,000	\$9,000		
23	Staff Training & Travel		\$500	\$500	\$500	\$1,500		
24	Rental of Equipment							
25	Small equipment & Supplies		\$1,081	\$1,081	\$1,081	\$3,243		
26	Auto - Fuel & Insurance		\$1,200	\$1,200	\$1,200	\$3,600		
27	Repair/Maintenance - equip		\$1,200	\$1,200	\$1,200	\$3,600		
28								
29								
30	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$224,771</b>	<b>\$224,771</b>	<b>\$224,771</b>	<b>\$674,312</b>		
32	<b>Non-DAAS</b>							<b>TOTAL</b>
33	<u>Expenditure Category</u>							
34	Rental of Property							
35	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$ -	\$ -	\$ -	\$ -		
36	Office Supplies, Postage							
37	Building Maintenance Supplies and Repair							
38	<b>FOOD COSTS</b>							
39	Raw Food	per meal \$ -						
40	Cong Food Svc Supplies	per meal \$ -						
41	HDM Food Svc Supplies	per meal \$ -						
42	Catered Meals	per meal \$ -						
43	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
44	Registered Dietitian							
45								
46	<b>OTHER COSTS:</b>							
47	Insurance							
48	Staff Training & Travel							
49								
50	Rental of Equipment							
51	Small equipment & Supplies							
52	Auto - Fuel & Insurance		\$3,515	\$3,515	\$3,515	\$10,545		
53	Repair/Maintenance - equip							
54								
56	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$3,515</b>	<b>\$3,515</b>	<b>\$3,515</b>	<b>\$10,545</b>		
57								
58	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$228,286</b>	<b>\$228,286</b>	<b>\$228,286</b>	<b>\$684,857</b>		
63	<b>HSA #3</b>		Form Rev. 12/22/16					

**Nutrition Compliance/Quality Assurance**

Services:

**Cost Per Service Unit:**

Document Date: 2/1/17

**Proposed Service Units:**

	Year 1 # of units/ sessions	Total Year 1	HSA-DAAS	Non-H.S.A	Year 2 # of units/ sessions	Total Year 2	HSA-DAAS	Non-H.S.A	Year 3 # of units/ sessions	Total Year 3	HSA-DAAS	Non-H.S.A
<b>Nutrition Education:</b> Annual #sessions (or presentation) a year or # Times a year handouts will be delivered to seniors in HDM												
<b>Nutrition Counseling:</b> Annual #hours to be provided Annual #sessions to be provided												
<b>HACCP Kitchen Monitoring</b> (1 unit = 1 session completed)	3.0	\$ 600	\$ 600	\$ -	3.0	\$ 600	\$ 600	\$ -	3.0	\$ 600	\$ 600	\$ -
<b>Site/Route Monitoring</b> (1 unit = 1 session completed):	12.0	\$ 250	\$ 250	\$ -	12.0	\$ 250	\$ 250	\$ -	12.0	\$ 250	\$ 250	\$ -
<b>Menu Planning &amp; Analysis</b> (1 unit = 1 set menu completed)	2.0	\$ 700	\$ 700	\$ -	2.0	\$ 700	\$ 700	\$ -	2.0	\$ 700	\$ 700	\$ -
<b>HDM Assessment</b> (1 units = annual intake assessment & reassessment completed)												
<b>OTHER Nutrition Compliance:</b> 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.

**Budget Narrative:**

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3											
4											
5	Contractor Name:				Term						
6	Bayview Senior Services				July 1, 2017 to June 30, 2020						
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:			REVENUE Cost Allocation:			REVENUE Cost Allocation:			
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Year 2	H.S.A.-DAAS	Non-HSA-DAAS	Year 3	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/17-6/30/18			7/1/18-6/30/19			7/1/19-6/30/20			7/1/17 to 6/30/20
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	HACCP Kitchen Monitoring										
28	Salaries & Benefits	\$1,800	\$1,800		\$1,800	\$1,800		\$1,800	\$1,800		\$5,400
29	Operating Expense										
30	Subtotal Direct	\$1,800	\$1,800		\$1,800	\$1,800		\$1,800	\$1,800		\$5,400
31	Indirect Percentage										
32	Indirect Expense										
33	Total HACCP Kitchen Monitoring	\$1,800	\$1,800		\$1,800	\$1,800		\$1,800	\$1,800		\$5,400
34	Site/Route Monitoring										
35	Salaries & Benefits	\$3,000	\$3,000		\$3,000	\$3,000		\$3,000	\$3,000		\$9,000
36	Operating Expense										
37	Subtotal Direct	\$3,000	\$3,000		\$3,000	\$3,000		\$3,000	\$3,000		\$9,000
38	Indirect Percentage										
39	Indirect Expense										
40	Total Site/Route Monitoring	\$3,000	\$3,000		\$3,000	\$3,000		\$3,000	\$3,000		\$9,000
41	Menu Planning										
42	Salaries & Benefits	\$1,400	\$1,400		\$1,400	\$1,400		\$1,400	\$1,400		\$4,200
43	Operating Expense										
44	Subtotal Direct	\$1,400	\$1,400		\$1,400	\$1,400		\$1,400	\$1,400		\$4,200
45	Indirect Percentage										
46	Indirect Expense										
47	Total Menu Planning	\$1,400	\$1,400		\$1,400	\$1,400		\$1,400	\$1,400		\$4,200
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										
57	Operating Expense										
58	Subtotal Direct										
59	Indirect Percentage										
60	Indirect Expense										
61	Total Other Nutrition Compliance										
62	GRAND Total Expenditures	\$6,200	\$6,200		\$6,200	\$6,200		\$6,200	\$6,200		\$18,600
63	HSA Revenues										
64											
65											
66	TOTAL HSA REVENUES										
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										

A		B	C	D	E	F	G	H	I	J	K	L	M	N	O
Appendix B.1, Page 2 Document Date: 2/1/17															
<b>HACCP Kitchen Monitoring Salaries &amp; Benefits Detail</b>															
1	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate														
2	(Same as Line 9 on HSA #1)														
3	TERM														
4	July 1, 2017 to June 30, 2020														
5															
6															
7															
8															
9															
10															
11															
12	POSITION TITLE	Agency Full Time Salary for FTE	Total % FTE	Program % FTE	Adjusted FTE	Budgeted Salary	REVENUE Cost Allocation	Program Budgeted Salary	Allocation	Program Budgeted Salary	Allocation	Program Budgeted Salary	Allocation	Program Budgeted Salary	Total Revenue
13	Mon	\$124,800	20%	7%	1%	\$1,800	H.S.A.-DAAS \$1,800	\$1,800	H.S.A.-DAAS \$1,800	\$1,800	Non-HSA-DAAS	\$1,800	Non-HSA-DAAS	\$1,800	\$5,400
14															
15															
16															
17															
18															
19															
20															
21															
22															
23															
24															
25															
26															
27															
28															
29															
30	TOTALS	\$124,800	0.20	7%	1%	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$5,400
31	FRINGE BENEFIT RATE														
32	EMPLOYEE FRINGE BENEFITS														
33															
34															
35															
36	TOTAL SALARIES & BENEFITS	\$124,800				\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$5,400
37	TOTAL SALARIES & BENEFITS for H.S.A. Program x3yrs	\$5,400													
38	HSA #6														
39															
40															
41															
42															
43															
44															



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O																																																																																																																																																																																	
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Document Date: 2/1/17



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

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

**I. Purpose**

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

**II. Definitions**

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

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

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

**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

B. Provide congregate meal services, which include:

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

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	1,154	1,154	1,154	3,462
#Meals	48,638	48,638	48,638	145,914

C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).

D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented by a RD based on the number of monitoring approved in the Grantee’s budget. Follow-up and in-service training shall be provided, as needed, to bring the



program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis and no later than once per quarter.

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

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

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

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

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

## VIII. Monitoring Activities

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

## IX. Reporting Requirements

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

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

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

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

	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>				Appendix B, pg. 1	
2					Document Date: 5/5/2017	
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: Centro Latino de San Francisco, Inc.				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod: 7/01/17		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Congregate-ENP	cong- ENP	cong- ENP	cong- ENP	TOTAL	Average cost/meal
9	<b>Annual #Meals Contracted</b>	48,638	48,638	48,638	145,914	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>Expenditures</b>					
12	Salaries & Benefits	\$224,406	\$224,406	\$224,406	\$673,218	\$4.61
13	Operating Expense	\$103,414	\$103,414	\$103,414	\$310,242	\$2.13
14	<b>Subtotal</b>	<b>\$327,820</b>	<b>\$327,820</b>	<b>\$327,820</b>	<b>\$983,460</b>	<b>\$6.74</b>
15	Indirect Percentage (max 10%)				\$0	
16	Indirect Cost (Line 14 X Line 13)				\$0	\$0.00
17	Capital Expenditure	\$0	\$0	\$0	\$0	\$0.00
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$327,820</b>	<b>\$327,820</b>	<b>\$327,820</b>	<b>\$983,460</b>	<b>\$6.74</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits	\$41,969	\$41,969	\$41,969	\$125,907	\$0.86
22	Operating Expense	\$89,553	\$89,553	\$89,553	\$268,659	\$1.84
23	Capital Expenditure	\$0	\$0	\$0	\$0	\$0.00
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$131,522</b>	<b>\$131,522</b>	<b>\$131,522</b>	<b>\$394,566</b>	<b>\$2.70</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$459,342</b>	<b>\$459,342</b>	<b>\$459,342</b>	<b>\$1,378,026</b>	<b>\$9.44</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals	\$327,820	\$327,820	\$327,820	\$983,459	
30					\$0	
31					\$0	
32					\$0	
33					\$0	
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$327,820</b>	<b>\$327,820</b>	<b>\$327,820</b>	<b>\$983,459</b>	
35	<i>PER MEAL COST, HSA-DAAS</i>	<i>\$6.74</i>	<i>\$6.74</i>	<i>\$6.74</i>	<i>\$6.74</i>	
36	<b>Non-DAAS Revenues</b>					
37	Project Income	43,774	43,774	43,774	0	\$0.00
38	Agency Cash - Fundraising	\$0	\$0	\$0	\$0	\$0.00
39	Agency In-Kind Volunteer	\$41,969	\$41,969	\$41,969	\$125,907	\$0.86
40	Facility Rental In-Kind	\$45,779	\$45,780	\$45,781	\$45,779	\$0.31
41					\$0	
42					\$0	
43					\$0	
44	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$131,522</b>	<b>\$131,523</b>	<b>\$131,524</b>	<b>\$171,686</b>	
45	<i>PER MEAL COST, NON HSA-DAAS</i>	<i>\$2.70</i>	<i>\$2.70</i>	<i>\$2.70</i>	<i>\$1.18</i>	
46	<b>TOTAL REVENUES</b>	<b>\$459,342</b>	<b>\$459,343</b>	<b>\$459,344</b>	<b>\$1,155,145</b>	
47	<b>PER MEAL COST, TOTAL</b>	<b>\$9.44</b>	<b>\$9.44</b>	<b>\$9.44</b>	<b>\$7.92</b>	
48	Full Time Equivalent (FTE)					
50	Prepared by: Gloria Bonilla		Phone No.: 415-286-0883			
51	HSA-CO Review Signature: _____			Date: 5-May-17		
52	HSA #1 (11/14/13)					

	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: Centro Latino de San Francisco, Inc.								Appendix B, page 2	
2	Program Name: Congregate-ENP								Date: 5/5/17	
3	cong- ENP									
4										
5										
6										
7										
8	<b>H.S.A-DAAS</b>	Agency Totals		For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	TOTAL	
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/17 to 6/30/18	
10	Executive Director Bonilla, Gloria	\$74,298	100%	53%	53%	39,719	39,719	39,719	\$119,157	
11	Nutritionist/Activities Facilitator Alvarez, Flor	\$34,320	100%	34%	34%	11,836	11,836	11,836	\$35,509	
12	Programs Comp.Coordinator Poveda, Olga	\$30,576	100%	15%	15%	4,521	4,521	4,521	\$13,563	
13	Accountant/HR Riano, Olivia	\$23,400	100%	24%	24%	5,516	5,516	5,516	\$16,548	
14	Accountant Asst./Bookkeeper TBD	\$7,098	100%	50%	50%	3,549	3,549	3,549	\$10,647	
15	Data Entry Clerk/ Scheduler Javier Barahona	\$7,020	100%	33%	33%	2,340	2,340	2,340	\$7,020	
16	Head Cook Crespin, Dora	\$45,760	100%	67%	67%	30,463	30,463	30,463	91,389	
17	Head Cook Asst. Figuroa, Alejandro	\$27,300	100%	60%	60%	16,369	16,369	16,369	\$49,107	
18	MNC Site Manager/Food Server Monge, Maria	\$31,200	100%	66%	66%	20,465	20,465	20,465	\$61,395	
19	VC Site Manager/food prep worker Jannet Urquijo	\$23,400	100%	46%	46%	10,789	10,789	10,789	\$32,367	
20	VC Data Entry Clerk Oscar Martinez	\$12,064	100%	58%	58%	6,975	6,975	6,975	20,925	
21	Los Mayores Site Mangr.& Asst. Instr. Omar Romero	\$31,200	100%	31%	31%	9,828	9,828	9,828	29,484	
22	Custodian, Driver II Javier Michel	\$15,080	100%	45%	45%	6,786	6,786	6,786	\$20,358	
23	Janitor/Dishwasher Castaneda, Domingo	\$18,850	100%	65%	65%	12,215	12,215	12,215	36,645	
24	Social Worker I Rivera, Sylvia	\$38,220	100%	17%	17%	6,392	6,392	6,392	19,176	
25	Driver II HDM/Food Purchaser Olivar, Joaquin	\$1,906	100%	100%	100%	1,906	1,906	1,906	\$5,718	
26	ESL Citizenship Instructor/Coordinator Sarti, Maria	\$2,182	100%	100%	100%	2,182	2,182	2,182	\$6,546	
27	Driver I Rodriguez, Procorro	\$4,290	100%	100%	100%	4,290	4,290	4,290	\$12,870	
28	Social Services Asst. [Comm. S. & HDM] Ana Quiceno	\$2,450	100%	100%	100%	2,450	2,450	2,450	\$7,349	
29	TOTALS	\$ 430,613				\$198,591	\$198,591	\$198,591	\$595,773	
30										
31	FRINGE BENEFIT RATE	13.00%								
32	EMPLOYEE FRINGE BENEFITS	\$ 55,980				\$25,815	\$25,815	\$25,815	\$77,445	
33										
34										

	A	B	C	D	E	F	G	H	I	J
35	<b>TOTAL DAAS SALARIES &amp; BENEFITS</b>	\$ 486,593					\$224,406	\$224,406	\$224,406	\$673,218
36										
37										
38	<b>Non - DAAS</b>	<b>Agency Totals</b>		<b>For DAAS Meal</b>						<b>TOTAL</b>
39	<b>POSITION TITLE and NAME</b>	<b>Annual Full Time Salary for FTE</b>	<b>Total % FTE (a)</b>	<b>% Nutr Prog (b)</b>	<b>Adjusted Nutr FTE</b>		<b>Budgeted Salary</b>	<b>Budgeted Salary</b>	<b>Budgeted Salary</b>	<b>7/1/17 to 6/30/18</b>
40	Volunteer - Food Service Ipolito Bamaca	\$ 27,040	36%	91%	32%		\$8,759	\$8,759	\$8,759	\$26,277
41	Volunteer - Food servnce & Client Registration Maria Hernandez	\$ 27,040	49%	62%	30%		\$8,184	\$8,184	\$8,184	\$24,552
42	Volunteer- Food Service Ana Ruiz	\$ 27,040	12%	100%	12%		\$3,168	\$3,168	\$3,168	\$9,504
43	Volunteer- Food Service Luz Dominguez	\$ 27,040	29%	92%	27%		\$7,286	\$7,286	\$7,286	\$21,858
44	Client Registration Sylvia Lopez	\$ 27,040	29%	92%	27%		\$7,286	\$7,286	\$7,286	\$21,858
45	Volunteer - Food Service Maria Beltran	\$ 27,040	29%	92%	27%		\$7,286	\$7,286	\$7,286	\$21,858
46										\$0
47										\$0
48										\$0
49										\$0
50	<b>TOTAL NON-DAAS</b>	\$ 162,240					\$41,969	\$41,969	\$41,969	\$125,907
51										
52	FRINGE BENEFIT RATE									
53	EMPLOYEE FRINGE BENEFITS	\$ -					\$0	\$0	\$0	\$0
54										
55										
56	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 162,240					\$41,969	\$41,969	\$41,969	\$125,907
57										
58	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 648,833					\$266,375	\$266,375	\$266,375	\$799,125



	A	B	C	D	E	F	G	H	I	
1	Grantee's Name: Centro Latino de							Appendix B, page 3		
2	Program Name: Congregate-ENP							Date: 5/5/17		
3	cong- ENP									
4	<b>Operating Expense Detail</b>									
5										
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	48,638	48,638	48,638	<b>TOTAL</b>				
8	<u>Expenditure Category</u>	<u>Term</u>	<u>7/1/17 to 6/30/18</u>	<u>7/1/18 to 6/30/19</u>	<u>7/1/19 to 6/30/20</u>	<u>7/1/17 to 6/30/18</u>				
9	Rental of Property								\$0	
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$15,325	\$15,325	\$15,325				\$45,975	
11	Office Supplies, Postage		\$628	\$628	\$628				\$1,884	
12	Building Improvements		\$1,997	\$1,997	\$1,997				\$5,991	
13	Building Maintenance Supplies and Repair		\$3,412	\$3,412	\$3,412				\$10,236	
14	<b>FOOD COSTS</b>									
15	Raw Food	per meal \$ 0.80	\$38,910	\$38,910	\$38,910				\$116,731	
16	Cong Food Svc Supplies	per meal \$ 0.15	\$7,296	\$7,296	\$7,296				\$21,888	
17	HDM Food Svc Supplies	per meal							\$0	
18	Catered Meals	per meal	\$0	\$0	\$0				\$0	
19	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>									
20	Consultant		\$3,250	\$3,250	\$3,250				\$9,750	
21									\$0	
22	<b>OTHER COSTS:</b>									
23	Payroll Services		\$1,331	\$1,331	\$1,331				\$3,993	
24	Accounting / Audit Fees		\$6,332	\$6,332	\$6,332				\$18,996	
25	Stipends		\$3,038	\$3,038	\$3,038				\$9,114	
26	Fuel		\$432	\$432	\$432				\$1,296	
27	Insurance(Liability)		\$5,359	\$5,359	\$5,359				\$16,077	
28	Insurance(Vehicle )		\$10,715	\$10,715	\$10,715				\$32,145	
29	Vehicle Repairs		\$2,192	\$2,192	\$2,192				\$6,576	
30	Printing		\$2,251	\$2,251	\$2,251				\$6,753	
31	Staff Dev		\$946	\$946	\$946				\$2,838	
32	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$103,414</b>	<b>\$103,414</b>	<b>\$103,414</b>				<b>\$310,242</b>	
34	<b>Non-DAAS</b>									
35	<u>Expenditure Category</u>	<u>Program</u>							<b>TOTAL</b>	
36	Rental of Property								\$0	
37	Utilities(Elec, Water, Gas, Phone, Scavenger)								\$0	
38	Office Supplies, Postage								\$0	
39	Building Maintenance Supplies and Repair								\$0	
40	<b>FOOD COSTS</b>									
41	Raw Food	per meal \$ 0.90	\$43,774	\$43,774	\$43,774				\$131,322	
42	Cong Food Svc Supplies	per meal							\$0	
43	HDM Food Svc Supplies	per meal							\$0	
44	Catered Meals	per meal	\$0	\$0	\$0				\$0	
45	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>									
46	Registered Dietitian								\$0	
47									\$0	
48	<b>OTHER COSTS:</b>									
49	Facility Rental In-Kind		\$45,779	\$45,779	\$45,779				\$137,337	
50									\$0	
51									\$0	
52									\$0	
53									\$0	
54									\$0	
55									\$0	
56									\$0	
57	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$89,553</b>	<b>\$89,553</b>	<b>\$89,553</b>				<b>\$268,659</b>	
58										
59	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$192,967</b>	<b>\$192,967</b>	<b>\$192,967</b>				<b>\$578,901</b>	

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

**I. Purpose**

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

**II. Definitions**

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



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

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

**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

B. Provide congregate meal services, which include:

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

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	799	799	799	2,397
#Meals	27,366	27,366	27,366	82,098

C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).

D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented by a RD based on the number of monitoring approved in the Grantee’s

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

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

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

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

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

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

## **VIII. Monitoring Activities**

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

## **IX. Reporting Requirements**

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

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

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

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



	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>				Appendix B, pg. 1	
2					Document Date: 5/16/2017	
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	<b>Grantee's Name: EPISCOPAL COMMUNITY SERVICES</b>				Grant Term	
6					7/1/17 to 6/30/20	
7	Program: Cong-ENP, HDM-ENP, Cong-AWD, HDM-AWD	Cong-ENP	Cong-ENP	Cong-ENP	TOTAL	Average cost/meal
8	<b>Annual #Meals Contracted</b>	27,366	27,366	27,366	82,098	
9	Program Term	7/1/17-6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
10	<b>DAAS Expenditures</b>					
11	Salaries & Benefits	\$141,450	\$141,450	\$141,450	\$424,350	\$5.17
12	Operating Expense	\$29,465	\$29,465	\$29,465	\$88,395	\$1.08
13	<b>Subtotal</b>	\$170,915	\$170,915	\$170,915	\$512,745	\$6.25
14	Indirect Percentage (%)	10%	10%	10%		
15	Indirect Cost (Line 14 X Line 13)	\$17,092	\$17,092	\$17,092	\$51,276	\$0.62
16	Capital Expenditure	\$0	\$0	\$0	\$0	\$0.00
17	<b>TOTAL DAAS EXPENDITURES</b>	\$188,007	\$188,007	\$188,007	\$564,021	\$6.87
18						
19	<b>Non-DAAS Expenditures</b>					
20	Salaries & Benefits	\$108,348	\$108,348	\$108,348	\$325,044	\$3.96
21	Operating Expense	\$58,581	\$58,581	\$58,581	\$175,743	\$2.14
22	Indirect Cost	\$16,693	\$16,693	\$16,693	\$50,079	\$0.61
23	<b>TOTAL Non-DAAS EXPENDITURES</b>	\$183,622	\$183,622	\$183,622	\$550,866	\$6.71
24						
25	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	\$371,629	\$371,629	\$371,629	\$1,114,887	\$13.58
26						
27	<b>HSA-DAAS Revenues</b>					
28	Meals	\$188,007	\$188,007	\$188,007	\$564,021	
29	Nutrition Compliance/Quality Assurance (NCQA)					
30						
31						
32						
33	<b>TOTAL HSA-DAAS REVENUES</b>	\$188,007	\$188,007	\$188,007	\$564,021	
34	Per MEAL COST, HSA-DAAS	\$6.87	\$6.87	\$6.87	\$6.87	
35	PER MEAL (w-NCQA) COST, HSA-DAA	\$6.87	\$6.87	\$6.87		
36	<b>Non-DAAS Revenues</b>					
37	Project Income	700	700	700	\$2,100	\$0.03
38	Agency Cash - Fundraising	\$74,574	\$74,574	\$74,574	\$223,722	\$2.73
39	In Kind Volunteers	\$108,348	\$108,348	\$108,348	\$325,044	\$3.96
40					\$0	
41					\$0	
42					\$0	
43	<b>TOTAL NON HAS-DAAS REVENUES</b>	\$183,622	\$183,622	\$183,622	\$550,866	
44	Per MEAL COST, Non-HSA-DAAS	\$6.71	\$6.71	\$6.71		\$6.71
45	<b>TOTAL REVENUES</b>	\$371,629	\$371,629	\$371,629	\$1,114,887	
46	PER MEAL COST, TOTAL	\$13.58	\$13.58	\$13.58		
47	Full Time Equivalent (FTE)					
49	Prepared by: Evelyn L. Lam	Phone No.: 415-487-3300 X1214			5/16/2017	
50	HSA-CO Review Signature: _____					
51	HSA #1 (9/23/15)					

	A	B	C	D	E	F	G	H	I	J	K	L
1	<b>Grantee's Name: EPISCOPAL COMMUNITY SERVICES</b>										Appendix B, page 2	
2	<b>Program Name: Cong-ENP</b>										Date: <b>5/16/17</b>	
3	<b>Salaries &amp; Benefits Detail</b>											
4												
5												
6												
7												
8	<b>H.S.A-DAAS</b>											
9	Agency Totals		For DAAS Nutrition		7/1/17-6/30/18		7/1/18 to 6/30/19		7/1/19 to 6/30/20		TOTAL	
10					90%		90%		90%			
11	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	ENP Budgeted Salary	ENP Budgeted Salary	ENP Budgeted Salary	ENP Budgeted Salary	ENP Budgeted Salary	7/1/17 to 6/30/20	
12	Director	\$96,904	100%	10%	10%	\$8,721	\$8,721	\$8,721	\$8,721	\$8,721	\$26,163	
13	Chef/Instructor	\$47,238	80%	100%	80%	\$34,011	\$34,011	\$34,011	\$34,011	\$34,011	\$102,033	
14	Associate Chef/Instructor	\$38,077	100%	50%	50%	\$17,135	\$17,135	\$17,135	\$17,135	\$17,135	\$51,405	
15	Database & Compliance Specialist	\$49,338	100%	25%	25%	\$11,101	\$11,101	\$11,101	\$11,101	\$11,101	\$33,303	
16	CHEFS Kitchens Catering & Cul Trng Mgr	\$62,107	100%	50%	50%	\$27,948	\$27,948	\$27,948	\$27,948	\$27,948	\$83,844	
17												
18												
19	TOTALS	\$ 293,664	4.80	2.35	2.15	\$98,916	\$98,916	\$98,916	\$98,916	\$98,916	\$296,748	
20												
21	FRINGE BENEFIT RATE	43.00%										
22	EMPLOYEE FRINGE BENEFITS					\$42,534	\$42,534	\$42,534	\$42,534	\$42,534	\$127,602	
23												
24												
25	TOTAL DAAS SALARIES & BENEFITS					\$141,450	\$141,450	\$141,450	\$141,450	\$141,450	\$424,350	
26												
27												
28	<b>Non - DAAS</b>											
29	POSITION TITLE and NAME	Agency Totals	For DAAS Meal		7/1/17-6/30/18		7/1/18 to 6/30/19		7/1/19 to 6/30/20		TOTAL	
30		Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/17 to 6/30/20	
31	Food Service Volunteer - In Kind	\$ 29,120	100%	100%	100%	\$26,208	\$26,208	\$26,208	\$26,208	\$26,208	\$78,624	
32	Food Service Volunteer - In Kind	\$ 29,120	100%	90%	90%	\$23,688	\$23,688	\$23,688	\$23,688	\$23,688	\$71,064	
33	Food Service Volunteer - In Kind	\$ 29,120	100%	12%	12%	\$3,024	\$3,024	\$3,024	\$3,024	\$3,024	\$9,072	
34	Food Service Volunteer - In Kind	\$ 29,120	100%	37%	37%	\$9,677	\$9,677	\$9,677	\$9,677	\$9,677	\$29,031	
35	CHEFS Kitchens Manager	\$73,173	100%	20%	20%	\$13,171	\$13,171	\$13,171	\$13,171	\$13,171	\$39,513	
36												
37												
38												
39												
40												
41												
42												
43												
44												
45												
46												
47	TOTAL NON-DAAS	\$ 189,653				\$75,768	\$75,768	\$75,768	\$75,768	\$75,768	\$227,304	
48												
49	FRINGE BENEFIT RATE	43.00%										
50	EMPLOYEE FRINGE BENEFITS					\$32,580	\$32,580	\$32,580	\$32,580	\$32,580	\$97,740	
51												
52												
53	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 189,653				\$108,348	\$108,348	\$108,348	\$108,348	\$108,348	\$325,044	
54												
55	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 189,653				\$249,798	\$249,798	\$249,798	\$249,798	\$249,798	\$749,394	



	A	B	C	D	E	F	G	H	I	J	K
1	<b>Grantee's Name: EPISCOPAL COMMUNITY SERVICES</b>										Appendix B, page 3
2	<b>Program Name:</b>										Date:
3	<b>Cong-ENP</b>										<b>05/16/17</b>
4	<b>Operating Expense Detail</b>										
5											
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:		27,366	27,366	27,366					<b>TOTAL</b>
8	<u>Expenditure Category</u>			<u>7/1/17-6/30/18</u>	<u>7/1/18 to 6/30/19</u>	<u>7/1/19 to 6/30/20</u>					<u>7/1/17 to 6/30/20</u>
9	Rental of Property										
10	Utilities(Elec, Water, Gas, Phone, Scavenger)										
11	Office Supplies, Postage										
12	Building Maintenance Supplies and Repair										
13	<b>FOOD COSTS</b>										
14	Raw Food	<i>per meal</i>	\$ 1.07	\$29,191	\$29,191	\$29,191					\$87,573
15	Cong Food Svc Supplies	<i>per meal</i>	\$ 0.01	\$274	\$274	\$274					\$822
16	HDM Food Svc Supplies	<i>per meal</i>									
17	Catered Meals	<i>per meal</i>									
18	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>										
19											
20											
21	<b>OTHER COSTS:</b>										
22	Insurance										
23	Staff Recruitment/Training & Travel										
24	Program/Client Supplies										
25	Office Supplies										
26	Auto - Fuel & Insurance										
27	Equipment Repairs & Maintenance										
28	Program Facilities Allocation										
29											
30	<b>TOTAL DAAS OPERATING EXPENSE</b>			<b>\$29,465</b>	<b>\$29,465</b>	<b>\$29,465</b>					<b>\$88,395</b>
32	<b>Non-DAAS</b>										
33	<u>Expenditure Category</u>	Program									<b>TOTAL</b>
34	Rental of Property										
35	Utilities(Elec, Water, Gas, Phone, Scavenger)										
36	Program/Client Supplies			\$4,230	\$4,230	\$4,230					\$12,690
37	Building Maintenance Supplies and Repair										
38	<b>FOOD COSTS</b>										
39	Raw Food	<i>per meal</i>	\$ 1.07	\$29,372	\$29,372	\$29,372					\$88,116
40	Cong Food Svc Supplies	<i>per meal</i>									
41	HDM Food Svc Supplies	<i>per meal</i>									
42	Catered Meals	<i>per meal</i>									
43	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>										
44	Registered Dietitian										
45											
46	<b>OTHER COSTS:</b>										
47	Insurance			\$630	\$630	\$630					\$1,890
48	Staff Training & Travel			\$360	\$360	\$360					\$1,080
49	Staff Recruitment			\$180	\$180	\$180					\$540
50	Printing & Reproduction			\$504	\$504	\$504					\$1,512
51	Small equipment & Supplies										
52	Equipment Repairs & Maintenance			\$810	\$810	\$810					\$2,430
53	Program Facilities Allocation			\$22,495	\$22,495	\$22,495					\$67,485
54											
55											
56	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>			<b>\$58,581</b>	<b>\$58,581</b>	<b>\$58,581</b>					<b>\$175,743</b>
57											
58	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>			<b>\$88,046</b>	<b>\$88,046</b>	<b>\$88,046</b>					<b>\$264,138</b>

Appendix Ba  
 Document Date: 5/18/17  
**HUMAN SERVICES AGENCY BUDGET SUMMARY  
 BY PROGRAM**

Contractor Name: Glide Foundation Term July 1, 2017 to June 30, 2020

(Check One) New  Renewal  Modification

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

Program: **Nutrition Compliance for ENP - Indicate HDM or Congregate**

Budget Reference Page No.(s)	REVENUE Cost Allocation:			REVENUE Cost Allocation:			REVENUE Cost Allocation:			Total Revenue
	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Year 2	H.S.A.-DAAS	Non-HSA-DAAS	Year 3	H.S.A.-DAAS	Non-HSA-DAAS	
Program Term	7/1/17-6/30/18			7/1/18-6/30/19			7/1/19-6/30/20			7/1/17 to 6/30/20
<b>Expenditures</b>										
<b>Nutrition Education</b>										
Salaries & Benefits										
Operating Expense	\$600	\$600		\$600	\$600		\$600	\$600		\$1,800
Subtotal Direct	\$600	\$600		\$600	\$600		\$600	\$600		\$1,800
Indirect Percentage										
Indirect Expense										
<b>Total Nutrition Education</b>	<b>\$600</b>	<b>\$600</b>		<b>\$600</b>	<b>\$600</b>		<b>\$600</b>	<b>\$600</b>		<b>\$1,800</b>
<b>Nutrition Counseling</b>										
Salaries & Benefits										
Operating Expense										
Subtotal Direct										
Indirect Percentage										
Indirect Expense										
<b>Total Nutrition Counseling</b>										
<b>HACCP Kitchen Monitoring</b>										
Salaries & Benefits										
Operating Expense	\$1,800	\$1,800		\$1,800	\$1,800		\$1,800	\$1,800		\$5,400
Subtotal Direct	\$1,800	\$1,800		\$1,800	\$1,800		\$1,800	\$1,800		\$5,400
Indirect Percentage										
Indirect Expense										
<b>Total HACCP Kitchen Monitoring</b>	<b>\$1,800</b>	<b>\$1,800</b>		<b>\$1,800</b>	<b>\$1,800</b>		<b>\$1,800</b>	<b>\$1,800</b>		<b>\$5,400</b>
<b>Site/Route Monitoring</b>										
Salaries & Benefits										
Operating Expense	\$750	\$750		\$750	\$750		\$750	\$750		\$2,250
Subtotal Direct	\$750	\$750		\$750	\$750		\$750	\$750		\$2,250
Indirect Percentage										
Indirect Expense										
<b>Total Site/Route Monitoring</b>	<b>\$750</b>	<b>\$750</b>		<b>\$750</b>	<b>\$750</b>		<b>\$750</b>	<b>\$750</b>		<b>\$2,250</b>
<b>Menu Planning</b>										
Salaries & Benefits										
Operating Expense	\$1,400	\$1,400		\$1,400	\$1,400		\$1,400	\$1,400		\$4,200
Subtotal Direct	\$1,400	\$1,400		\$1,400	\$1,400		\$1,400	\$1,400		\$4,200
Indirect Percentage										
Indirect Expense										
<b>Total Menu Planning</b>	<b>\$1,400</b>	<b>\$1,400</b>		<b>\$1,400</b>	<b>\$1,400</b>		<b>\$1,400</b>	<b>\$1,400</b>		<b>\$4,200</b>
<b>HDM Assessments</b>										
Salaries & Benefits										
Operating Expense	\$1,000	\$1,000		\$1,000	\$1,000		\$1,000	\$1,000		\$3,000
Subtotal Direct	\$1,000	\$1,000		\$1,000	\$1,000		\$1,000	\$1,000		\$3,000
Indirect Percentage										
Indirect Expense										
<b>Total HDM Assessments</b>										
<b>Other Nutrition Compliance</b>										
Salaries & Benefits										
Operating Expense	\$1,000	\$1,000		\$1,000	\$1,000		\$1,000	\$1,000		\$3,000
Subtotal Direct	\$1,000	\$1,000		\$1,000	\$1,000		\$1,000	\$1,000		\$3,000
Indirect Percentage										
Indirect Expense										
<b>Total Other Nutrition Compliance</b>	<b>\$1,000</b>	<b>\$1,000</b>		<b>\$1,000</b>	<b>\$1,000</b>		<b>\$1,000</b>	<b>\$1,000</b>		<b>\$3,000</b>
<b>GRAND Total Expenditures</b>	<b>\$5,550</b>	<b>\$5,550</b>		<b>\$5,550</b>	<b>\$5,550</b>		<b>\$5,550</b>	<b>\$5,550</b>		<b>\$16,650</b>
<b>HSA Revenues</b>										
<b>TOTAL HSA REVENUES</b>										
<b>Other Non-H.S.A.-DAAS Revenues</b>										
<b>TOTAL OTHER REVENUES</b>										
Full Time Equivalent (FTE)										

Prepared by: \_\_\_\_\_ Telephone No.: \_\_\_\_\_ Date \_\_\_\_\_

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

HSA #1

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1																				
2																				
3																				
4	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate																			
5	(Same as Line 9 on HSA #1)																			
6																				
7																				
8	<b>TERM:</b>																			
9	July 1, 2017 to June 30, 2020																			
10																				
11																				
12	Expenditure Category	Year 1 7/1/17-6/30/18	REVENUE Cost Allocation: H.S.A.-DAAS	DAAS	Year 2 7/1/18-6/30/19	REVENUE Cost Allocation: H.S.A.-DAAS	DAAS	Year 3 7/1/19-6/30/20	REVENUE Cost Allocation: H.S.A.-DAAS	DAAS	Year 3 7/1/19-6/30/20	REVENUE Cost Allocation: H.S.A.-DAAS	DAAS	TOTAL REVENUE 7/1/17 to 6/30/20						
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 (under \$5,000/item)																			
22	Rental of Equipment																			
23																				
24	SUBCONTRACTORS Descriptive Title																			
25	Consultant	\$600	\$600		\$600	\$600		\$600	\$600		\$600	\$600	\$1,800							
26	b																			
27	c																			
28	d																			
29	e																			
30	OTHER																			
31	z																			
32	y																			
33	x																			
34	w																			
35	v																			
36																				
37	TOTAL OPERATING EXPENSE	\$600	\$600		\$600	\$600		\$600	\$600		\$600	\$600	\$1,800							
38	TOTAL OPERATING EXPENSE x3yrs	\$1,800																		
39	HSA #3																			

Appendix Ba  
Document Date: 5/18/17

**Nutrition Education Operating Expense Detail**

Document Date: 5/18/17

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1																				Appendix Ba
2																				Document Date: 5/18/17
3																				
4																				
5																				
6																				
7																				
8																				
9	TERM:																			
10	July 1, 2017 to June 30, 2020																			
11																				
12																				
13	Expenditure Category																			
14	Rental of Property																			
15	Utilities(Elec, Water, Gas, Phone, Scavenger)																			
16	Office Supplies, Postage																			
17	Building Maintenance Supplies and Repair																			
18	Printing and Reproduction																			
19	Insurance																			
20	Staff Training																			
21	Staff Travel																			
22	Small Equipment (under \$5,000/item)																			
23	Rental of Equipment																			
24																				
25	SUBCONTRACTORS Descriptive Title																			
26	Consultant/Kathleen da Silva -																			
27	b																			
28	c																			
29	d																			
30	e																			
31	OTHER																			
32	z																			
33	y																			
34	x																			
35	w																			
36	v																			
37																				
38	TOTAL OPERATING EXPENSE																			
39	TOTAL OPERATING EXPENSE x3yrs																			
40																				
41	HSA #																			

HACCP Kitchen Monitoring Operating Expense Detail

Document Date: 5/18/17



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1																					
2																					
3																					
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41																					

**Menu Planning Operating Expense Detail**

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

TERM:  
July 1, 2017 to June 30, 2020

Appendix B  
Document Date: 5/18/17

Document Date: 5/18/17

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	
1																						
2																						
3																						
4	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate																					
5	(Same as Line 9 on HSA #1)																					
6																						
7																						
8																						
9	TERM:																					
10	July 1, 2017 to June 30, 2020																					
11																						
12																						
13	Other Nutrition Compliance Operating Expense Detail																					
14	Expenditure Category	Year 1	Year 2	Year 3	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	REVENUE Cost Allocation:	TOTAL REVENUE		
15	Rental of Property	7/1/17-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	H.S.A.-DAAS	7/1/17 to 6/30/20	
16	Utilities(Elec, Water, Gas, Phone, Scavenger)																					
17	Office Supplies, Postage																					
18	Building Maintenance Supplies and Repair																					
19	Printing and Reproduction																					
20	Insurance																					
21	Staff Training																					
22	Staff Travel																					
23	Small Equipment (over \$500 but under \$5,000/item)																					
24	Rental of Equipment																					
25	SUBCONTRACTORS Descriptive Title																					
26	Consultant/Kathleen da Silva: In-Service Training	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$3,000	
27	b																					
28	c																					
29	d																					
30	e																					
31	OTHER																					
32	z																					
33	y																					
34	x																					
35	w																					
36	v																					
37																						
38	TOTAL OPERATING EXPENSE	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$3,000	
39	TOTAL OPERATING EXPENSE x3yrs	\$3,000																				
40																						
41	HSA #15																					

Document Date: 5/18/17

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

**I. Purpose**

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

**II. Definitions**

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



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

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

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

**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

B. Provide congregate meal services, which include:

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

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	800	800	800	2,400
#Meals	39,086	39,086	39,086	117,258

C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).

D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented by a RD based on the number of monitoring approved in the Grantee’s

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

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

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

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

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

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

## **VIII. Monitoring Activities**

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

## **IX. Reporting Requirements**

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

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

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

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



	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>				Appendix B, pg. 1	
2					Document Date: 5/18/2017	
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: Glide Foundation				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)	Cong-ENP	Cong-ENP	Cong-ENP	TOTAL	Average cost/meal
9	<b>Annual #Meals Contracted</b>	39,086	39,086	39,086	117,258	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>					
12	Salaries & Benefits	\$26,799	\$26,799	\$26,799	\$80,396	\$0.69
13	Operating Expense	\$92,948	\$92,948	\$92,948	\$278,844	\$2.38
14	<b>Subtotal</b>	<b>\$119,747</b>	<b>\$119,747</b>	<b>\$119,747</b>	<b>\$359,241</b>	<b>\$3.06</b>
15	Indirect Percentage (max 10%)	10%	10%	10%		
16	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)	\$11,975	\$11,975	\$11,975	\$35,924	\$0.31
17	Capital Expenditure					
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$131,722</b>	<b>\$131,722</b>	<b>\$131,722</b>	<b>\$395,165</b>	<b>\$3.37</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits	\$88,942	\$88,942	\$88,942	\$266,826	\$2.28
22	Operating Expense	\$34,677	\$34,677	\$34,677	\$104,030	\$0.89
23	Capital Expenditure					
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$123,619</b>	<b>\$123,619</b>	<b>\$123,619</b>	<b>\$370,857</b>	<b>\$3.16</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$255,340</b>	<b>\$255,340</b>	<b>\$255,340</b>	<b>\$766,021</b>	<b>\$6.53</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals	\$131,722	\$131,722	\$131,722	\$395,166	
30	Nutrition Compliance (if your agency is requesting funds)	\$5,550	\$5,550	\$5,550	\$16,650	
31						
32						
33						
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$137,272</b>	<b>\$137,272</b>	<b>\$137,272</b>	<b>\$411,816</b>	
35	PER MEAL COST, HSA-DAAS	\$3.37	\$3.23	\$3.23	\$3.23	
36	Per MEAL & COMPLIANCE COST	\$3.51	\$3.37	\$3.37	\$3.37	
37	<b>Non-DAAS Revenues</b>					
38	Project Income					
39	Agency Cash - Fundraising	\$64,727	\$64,727	\$64,727	\$194,181	\$1.66
40	Agency In-Kind Volunteer	\$58,240	\$58,240	\$58,240	\$174,720	\$1.49
41	Nutrition Compliance Revenues					
42						
43	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$122,967</b>	<b>\$122,967</b>	<b>\$122,967</b>	<b>\$368,901</b>	
44	PER MEAL COST, NON HSA-DAAS	\$3.15	\$3.15	\$3.15	\$3.15	
45	<b>TOTAL REVENUES</b>	<b>\$260,239</b>	<b>\$260,239</b>	<b>\$260,239</b>	<b>\$780,717</b>	
46	PER MEAL COST, TOTAL	\$6.66	\$6.66	\$6.66	\$6.66	
47	Full Time Equivalent (FTE)					
49	Prepared by:	Phone No.:		Date:		
50	HSA-CO Review Signature:				Date:	
51	HSA #1					

Form Rev. 12/22/16

	A	B	C	D	E	F	G	H	I	J	
1	Grantee's Name: Glide Foundation							Appendix B, page 2			
2	Program Name:							Date: 2/10/2017			
3	Cong-ENP										
4											
5											
6											
7											
8	<b>H.S.A-DAAS</b>							<b>TOTAL</b>			
9	POSITION TITLE and NAME	Agency Totals	For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20			
10		Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary		
11	George Gundry - Director	\$130,000	100%	2%	2%	\$1,950	\$1,950	\$1,950	\$5,850		
12	Joselyn Barrera - Culinary Manag	\$65,000	100%	2%	2%	\$1,300	\$1,300	\$1,300	\$3,900		
13	Cho Wing Chung - Chef	\$36,110	100%	2%	2%	\$722	\$722	\$722	\$2,167		
14	James Sampagna - Shift Leader	\$43,682	100%	2%	2%	\$802	\$802	\$802	\$2,406		
15	Alexis Santiago - Shift Leader	\$35,153	100%	2%	2%	\$668	\$668	\$668	\$2,004		
16	Leon Thomas III - Steward	\$46,594	100%	2%	2%	\$867	\$867	\$867	\$2,600		
17	Dishwashers - 2	\$62,402	100%	10%	10%	\$6,240	\$6,240	\$6,240	\$18,721		
18	Program Navigator- TBA-2	\$80,000	100%	10%	10%	\$7,951	\$7,951	\$7,951	\$23,852		
19	Tina Huang-Program Assistant	\$43,702	100%	1%	1%	\$437	\$437	\$437	\$1,311		
20	TOTALS	\$ 542,643	900%	31%	31%	\$20,936	\$20,937	\$20,937	\$62,810		
21	FRINGE BENEFIT RATE	28.0%									
22	EMPLOYEE FRINGE BENEFITS	\$ 151,940				\$5,862	\$5,862	\$5,862	\$17,587		
23											
24											
25	<b>TOTAL DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 694,583</b>				<b>\$26,799</b>	<b>\$26,799</b>	<b>\$26,799</b>	<b>\$80,396</b>		
26											
27											
28	<b>Non - DAAS</b>	Agency Totals		For DAAS Meal					TOTAL		
29	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	Budgeted Salary		
30	Program Director	\$ 130,000	100%	2%	2.00%	\$2,600	\$2,600	\$2,600	\$7,800		
31	Data & Contracts Coordinator	\$ 52,896	100%	2%	2.00%	\$1,058	\$1,058	\$1,058	\$3,174		
32	Security Monitor	\$ 32,802	100%	5%	5.00%	\$1,640	\$1,640	\$1,640	\$4,920		
33	Meals Volunteers	\$ 29,120	1500%	13%	200.00%	\$58,240	\$58,240	\$58,240	\$174,720		
34	Assistant Manager	\$ 65,000	100%	2%	2.00%	\$1,300	\$1,300	\$1,300	\$3,900		
35	Senior Director of Programs	\$ 155,000	100%	2%	2.00%	\$3,100	\$3,100	\$3,100	\$9,300		
36	Senior Manager of Programs	\$ 77,400	100%	2%	2.00%	\$1,548	\$1,548	\$1,548	\$4,644		
37											
38											
39											
40											
41											
42											
43											
44											
45											
46											
47	<b>TOTAL NON-DAAS</b>	<b>\$ 542,218</b>	<b>2100%</b>	<b>28%</b>	<b>215%</b>	<b>\$69,486</b>	<b>\$69,486</b>	<b>\$69,486</b>	<b>\$209,458</b>		
48											
49	FRINGE BENEFIT RATE	28.0%									
50	EMPLOYEE FRINGE BENEFITS	\$ 151,821				\$19,456	\$19,456	\$19,456	\$58,368		
51											
52											
53	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 694,039</b>				<b>\$68,942</b>	<b>\$68,942</b>	<b>\$68,942</b>	<b>\$266,826</b>		
54											
55	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 1,388,622</b>				<b>\$115,741</b>	<b>\$115,741</b>	<b>\$115,741</b>	<b>\$347,222</b>		
56	HSA #2										

Form Rev. 12/22/16



	A	B	C	D	E	F	G	H
1	Grantee's Name: Glide Foundation							Appendix B, page 3
2	Program Name:							Date: 2/10/2017
3	Cong-ENP							
4	<b>Operating Expense Detail</b>							
7	H.S.A-DAAS	Annual #Meals Contracted:	39,086	39,086	39,086	TOTAL		
8	Expenditure Category	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property							
10	Utilities(Elec, Water, Gas, Phone, Scavenger)							
11	Office Supplies, Postage							
12	Building Maintenance Supplies and Repair							
13	FOOD COSTS							
14	Raw Food	per meal \$ 1.79	\$69,964	\$69,964	\$69,964	\$209,892		
15	Cong Food Svc Supplies	per meal \$ 0.13	\$5,081	\$5,081	\$5,081	\$15,244		
16	HDM Food Svc Supplies	per meal \$ -						
17	Catered Meals	per meal \$ -						
18	CONSULTANT/SUBCONTRACTOR Descriptive Title							
19	Registered Dietitian		\$5,550	\$5,550	\$5,550	\$16,650		
20								
21	OTHER COSTS:							
22	Insurance							
23	Staff Training & Travel							
24	Rental of Equipment							
25	Garbage		\$750	\$750	\$750	\$2,250		
26	Information Technology		\$500	\$500	\$500	\$1,500		
27	Repair/Maintenance		\$1,827	\$1,827	\$1,827	\$5,481		
28	Food Storage		\$1,042	\$1,042	\$1,042	\$3,126		
29	Occupancy		\$8,234	\$8,234	\$8,234	\$24,702		
30	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$92,948</b>	<b>\$92,948</b>	<b>\$92,948</b>	<b>\$278,844</b>		
32	<b>Non-DAAS</b>							
33	Expenditure Category							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 \$ 0.37	\$14,462	\$14,462	\$14,462	\$43,385		
40	Cong Food Svc Supplies	per meal \$ -						
41	HDM Food Svc Supplies	per meal \$ -						
42	Catered Meals	per meal \$ -						
43	CONSULTANT/SUBCONTRACTOR Descriptive Title							
44	Registered Dietitian							
45								
46	OTHER COSTS:							
47	Insurance							
48	Staff Training & Travel							
49	Rental of Equipment							
50	Equipment		\$1,370	\$1,370	\$1,370	\$4,110		
51	Garbage		\$1,200	\$1,200	\$1,200	\$3,600		
52	Information Technology		\$2,000	\$2,000	\$2,000	\$6,000		
53	Occupancy		\$15,645	\$15,645	\$15,645	\$46,935		
54								
56	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$34,677</b>	<b>\$34,677</b>	<b>\$34,677</b>	<b>\$104,030</b>		
58	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$127,625</b>	<b>\$127,625</b>	<b>\$127,625</b>	<b>\$382,875</b>		
63	HSA #3	Form Rev. 12/22/16						

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

**I. Purpose**

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

**II. Definitions**

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

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

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

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

**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

Table A	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	1,080	1,080	1,080	3,240
#Meals	67,638	67,638	67,638	202,914

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

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

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

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

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

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

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



## VIII. Monitoring Activities

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

## IX. Reporting Requirements

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



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

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

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

	A	B	C	D	E	F	G	
1	<b>BUDGET FORMS</b>						Appendix B, pg. 1	
2							Document Date: 5/16/2017	
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>							
4	<b>BUDGET PROPOSAL FORMS</b>							
5	Grantee's Name: Kimochi, Inc.					Grant Term		
6						7/1/1 to 6/30/20		
7	Program: Cong-ENP, HDM-ENP, Cong-AWD, HDM-AWD		CG-ENP NEW				TOTAL	
8	<b>Annual #Meals Contracted</b>		67,638	67,638	67,638		<b>202,914</b>	
9	Program Term		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/179 to 6/30/20	1/0/00	7/1/17 to 6/30/20	
10	<b>DAAS Expenditures</b>							
11	Salaries & Benefits		\$140,895	\$140,895	\$140,895		\$422,685	
12	Operating Expense		\$274,199	\$274,199	\$274,199		\$822,597	
13	<b>Subtotal</b>		\$415,094	\$415,094	\$415,094		\$1,245,282	
14	Indirect Percentage (%)		10%	10%	10%		\$0	
15	Indirect Cost (Line 14 X Line 13)		\$43,490	\$43,490	\$43,490		\$130,470	
16	Capital Expenditure		\$0	\$0	\$0		\$0	
17	<b>TOTAL DAAS EXPENDITURES</b>		<b>\$458,584</b>	<b>\$458,584</b>	<b>\$458,584</b>		<b>\$1,375,752</b>	
18								
19	<b>Non-DAAS Expenditures</b>							
20	Salaries & Benefits		\$121,797	\$121,797	\$121,797		\$365,391	
21	Operating Expense		\$97,572	\$97,572	\$97,572		\$292,716	
22	Indirect Cost		\$41,801	\$41,801	\$41,801		\$125,403	
23	<b>TOTAL Non-DAAS EXPENDITURES</b>		<b>\$261,170</b>	<b>\$261,170</b>	<b>\$261,170</b>		<b>\$783,510</b>	
24								
25	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>		<b>\$719,754</b>	<b>\$719,754</b>	<b>\$719,754</b>		<b>\$2,159,262</b>	
26								
27	<b>HSA-DAAS Revenues</b>							
28	Meals		\$458,584	\$458,584	\$458,584		\$1,375,752	
29	NCQA		\$5,100	\$5,100	\$5,100		\$15,300	
30								
31								
32								
33	<b>TOTAL HSA-DAAS REVENUES</b>		<b>\$463,684</b>	<b>\$463,684</b>	<b>\$463,684</b>		<b>\$1,391,052</b>	
34	Per MEAL COST, HSA-DAAS		\$6.78	\$6.78	\$6.78		\$6.78	
35	with NCQA		\$6.86	\$6.86	\$6.86		\$6.86	
36	<b>Non-DAAS Revenues</b>							
37	Project Income		123,510	123,510	\$123,510		\$370,530	
38	Donations		9,699	9,699	\$9,699		\$29,097	
39	Fundraising			0	\$0		\$0	
40	Agency In-Kind Volunteer		\$121,797	121,797	\$121,797		\$365,391	
41	Agency In-Kind Food		\$6,164	6,164	\$6,164		\$18,492	
42							\$0	
43	<b>TOTAL NON HSA-DAAS REVENUES</b>		<b>\$261,170</b>	<b>\$261,170</b>	<b>\$261,170</b>		<b>\$783,510</b>	
44	PER MEAL COST, NON HSA-DAAS		\$ 3.86	\$ 3.86	\$ 3.86		\$ 3.86	
45	<b>TOTAL REVENUES</b>		<b>\$724,854</b>	<b>\$724,854</b>	<b>\$724,854</b>		<b>\$2,174,562</b>	
46	PER MEAL COST, TOTAL		\$10.72	\$10.72	\$10.72		\$10.72	
47	Full Time Equivalent (FTE)							
49	Prepared by: Rod Valdepenas				Phone No.: (415) 931-2294		5/16/2017	
50	HSA-CO Review Signature:	_____						
51	HSA #1 (10/20/15)							
52	NOTE: Cells with formulas are protected to avoid accidental changes. To unprotect, go to "Tools" then "Unprotect sheet". No password needed.							
53	Figures in column B are just examples. Replace these figures with your agency's actual figures in the Salary, Operating & Capital Detail worksheets.							
54								
55								
56		\$0	\$5,100	\$5,100	\$5,100	\$0	\$15,300	
57								
58			0.00					
59								

	A	B	C	D	E	F	G	H	I	J	K	L	
1	Grantee's Name: Kimochi, Inc.											Appendix B, page 2	
2	Program Name:											Date: 5/16/17	
3	CG-ENP NEW												
4													
5	<b>Salaries &amp; Benefits Detail</b>												
6													
7													
8	<b>H.S.A-DAAS</b>	Agency Totals		For DAAS Nutrition			7/1/17 to 6/30/18		7/1/18 to 6/30/19		7/1/19 to 6/30/20		TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE		Budgeted Salary		Budgeted Salary		Budgeted Salary		7/1/17 to 6/30/20
10	Potwasher 1	\$29,120	75%	62%	46%		\$13,491		\$13,491		\$13,491		\$40,473
11									\$0		\$0		
12	PotWasher 2	\$29,120	75%	100%	75%		\$21,840		\$21,840		\$21,840		\$65,520
13	Senior Center Asst.	\$35,360	100%	35%	35%		\$12,376		\$12,376		\$12,376		\$37,128
14	Senior Center Coordinator	\$43,680	100%	44%	44%		\$19,203		\$19,203		\$19,203		\$57,609
15	Head Cook	\$36,400	75%	62%	46%		\$16,864		\$16,864		\$16,864		\$50,592
16	Asst. Cook 2	\$30,160	75%	62%	46%		\$13,973		\$13,973		\$13,973		\$41,919
17	Asst. Cook 1	\$31,200	75%	62%	46%		\$14,455		\$14,455		\$14,455		\$43,365
18													
19					0%		\$0						\$0
20	TOTALS	\$ 235,040	575%	575%	339%		\$112,202		\$112,202		\$112,202	\$0	\$336,606
21													
22	FRINGE BENEFIT RATE	25.50%											
23	EMPLOYEE FRINGE BENEFITS	\$ 59,935					\$28,693		\$28,693		\$28,693		\$86,079
24													
25													
26	<b>BENEFITS</b>	\$ 294,975					\$140,895		\$140,895		\$140,895		\$422,685
27													
28													
29	<b>Non - DAAS</b>	Agency Totals		For DAAS Meal									TOTAL
30	POSITION TITLE and NAME	TimeSalary	FTE (a)	Prog (b)	Nutr FTE		Salary		Salary		Salary		7/1/17 to 6/30/20
31													
32	Agency In-Kind Volunteer						\$121,797		\$121,797		\$121,797		\$365,391
33													\$0
34													\$0
35													\$0
36													\$0
37													\$0
38													\$0
39													\$0
40													\$0
41													\$0
42													\$0
43													\$0
44													\$0
45													\$0
46													\$0
47	TOTAL NON-DAAS	\$ -					\$121,797	\$0	\$121,797		\$121,797	\$0	\$365,391
48													
49	FRINGE BENEFIT RATE												
50	EMPLOYEE FRINGE BENEFITS	\$ -					\$0						\$0
51													
52													
53	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	\$ -					\$121,797		\$121,797		\$121,797		\$365,391
54													
55	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 294,975					\$262,692		\$262,692		\$262,692		\$788,076

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Grantee's Name: Kimochi, Inc.											Appendix B, page 3	
2	Program Name:											Date: 5/16/2017	
3	<b>CG-ENP NEW</b>												
4	<b>Operating Expense Detail</b>												
5													
6													
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	67,638	67,638	67,638							<b>TOTAL</b>	
8	<u>Expenditure Category</u>	<u>Term</u>	<u>7/1/17 to 6/30/18</u>	<u>7/1/18 to 6/30/19</u>	<u>7/1/19 to 6/30/20</u>							<u>7/1/17 to 6/30/20</u>	
9	Auto - Fuel			\$0	\$0							\$0	
10	OTO - Rent			\$0	\$0							\$0	
11	Repairs/Maintenance		\$8,000	\$8,000	\$8,000							\$24,000	
12	Computer/IT/Website		\$2,666	\$2,666	\$2,666							\$7,998	
13	Dues/Subscriptions		\$100	\$100	\$100							\$300	
14	Insurance - D&O/Other		\$233	\$233	\$233							\$699	
15	Insurance - General		\$2,514	\$2,514	\$2,514							\$7,542	
16	Maintenance Contracts			\$0	\$0							\$0	
17	Outside Services		\$4,800	\$4,800	\$4,800							\$14,400	
18	Postage		\$380	\$380	\$380							\$1,140	
19	Printing		\$400	\$400	\$400							\$1,200	
20	Prof Services - Acctg		\$3,000	\$3,000	\$3,000							\$9,000	
21	Rent - Property		\$36,285	\$36,285	\$36,285							\$108,856	
22	Rent - Parking		\$0	\$0	\$0							\$0	
23	Supplies/Materials		\$1,860	\$1,860	\$1,860							\$5,580	
24	Telephone		\$3,536	\$3,536	\$3,536							\$10,608	
25	Utilities		\$21,376	\$21,376	\$21,376							\$64,128	
26				\$0	\$0							\$0	
27	<b>FOOD COSTS</b>											\$0	
28	Raw Food	<i>per meal</i> \$ 2.52	\$170,308	\$170,308	\$170,308							\$510,925	
29	Cong Food Svc Supplies	<i>per meal</i> \$ 0.28	\$18,740	\$18,740	\$18,740							\$56,221	
30	HDM Food Svc Supplies	<i>per meal</i>	\$0	\$0	\$0							\$0	
31		<i>per meal</i>		\$0	\$0							\$0	
32	<b>TOTAL DAAS OPERATING EXPENSE</b>		\$274,199 #	\$274,199	\$274,199 ##							\$0 # \$822,597	
33													
34	<b>Non-DAAS</b>											<b>TOTAL</b>	
35	<u>Expenditure Category</u>	<u>Program</u>											
36	Outside Services											\$0	
37	Postage											\$0	
38	Printing											\$0	
39	Repairs/Maintenance											\$0	
40	Rent - Property											\$0	
41	Telephone											\$0	
42	Utilities		\$20,000	\$20,000	\$20,000							\$60,000	
43	Eqpt. Purchase		\$16,729	\$16,729	\$16,729							\$50,187	
44	<b>FOOD COSTS</b>											\$0	
45	Raw Food	<i>per meal</i> \$ 0.81	\$54,679	\$54,679	\$54,679							\$164,037	
46	Cong Food Svc Supplies	<i>per meal</i>	\$0	\$0	\$0							\$0	
47	HDM Food Svc Supplies	<i>per meal</i>		\$0	\$0							\$0	
48	In Kind Food	<i>per meal</i> \$0.09	\$6,164	\$6,164	\$6,164							\$18,492	
49												\$0	
50												\$0	
51												\$0	
52	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		\$97,572 #	\$97,572	\$97,572 ##							\$0 # \$292,716	
53													
54	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		\$371,771 #	\$371,771	\$371,771 ##							# \$1,115,313	

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
 BY PROGRAM**

Contractor Name  
 Kimochi, Inc.

Term  
 July 1, 2017 to June 30, 2020

(Check One) New  Renewal  Modification

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

9	Program: Nutrition Compliance for ENP- Congregate	REVENUE Cost Allocation:			REVENUE Cost Allocation:			REVENUE Cost Allocation:			Total Revenue
		Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Year 2	H.S.A.-DAAS	Non-HSA-DAAS	Year 3	H.S.A.-DAAS	Non-HSA-DAAS	
10	Budget Reference Page No.(s)										
11	Program Term	7/1/17-6/30/18			7/1/18-6/30/19			7/1/19-6/30/20			7/1/17 to 6/30/20
12	Expenditures										
13	Nutrition Education										
14	Salaries & Benefits	\$480	\$480		\$480	\$480		\$480	\$480		\$1,440
15	Operating Expense										
16	Subtotal Direct	\$480	\$480		\$480	\$480		\$480	\$480		\$1,440
17	Indirect Percentage										
18	Indirect Expense										
19	Total Nutrition Education	\$480	\$480		\$480	\$480		\$480	\$480		\$1,440
20	Nutrition Counseling										
21	Salaries & Benefits										
22	Operating Expense										
23	Subtotal Direct										
24	Indirect Percentage										
25	Indirect Expense										
26	Total Nutrition Counseling										
27	HACCP Kitchen Monitoring										
28	Salaries & Benefits	\$1,170	\$1,170		\$1,170	\$1,170		\$1,170	\$1,170		\$3,510
29	Operating Expense										
30	Subtotal Direct	\$1,170	\$1,170		\$1,170	\$1,170		\$1,170	\$1,170		\$3,510
31	Indirect Percentage										
32	Indirect Expense										
33	Total HACCP Kitchen Monitoring	\$1,170	\$1,170		\$1,170	\$1,170		\$1,170	\$1,170		\$3,610
34	Site/Route Monitoring										
35	Salaries & Benefits	\$2,700	\$2,700		\$2,700	\$2,700		\$2,700	\$2,700		\$8,100
36	Operating Expense										
37	Subtotal Direct	\$2,700	\$2,700		\$2,700	\$2,700		\$2,700	\$2,700		\$8,100
38	Indirect Percentage										
39	Indirect Expense										
40	Total Site/Route Monitoring	\$2,700	\$2,700		\$2,700	\$2,700		\$2,700	\$2,700		\$8,100
41	Menu Planning										
42	Salaries & Benefits	\$750	\$750		\$750	\$750		\$750	\$750		\$2,250
43	Operating Expense										
44	Subtotal Direct	\$750	\$750		\$750	\$750		\$750	\$750		\$2,250
45	Indirect Percentage										
46	Indirect Expense										
47	Total Menu Planning	\$750	\$750		\$750	\$750		\$750	\$750		\$2,250
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										
57	Operating Expense										
58	Subtotal Direct										
59	Indirect Percentage										
60	Indirect Expense										
61	Total Other Nutrition Compliance										
62	GRAND Total Expenditures	\$5,100	\$5,100		\$5,100	\$5,100		\$5,100	\$5,100		\$15,300.0
63	HSA Revenues										
64											
65											
66	TOTAL HSA REVENUES										
67	Other Non-H.S.A.-DAAS Revenues										
68											
69											
70											
71	TOTAL OTHER REVENUES										
72	Full Time Equivalent (FTE)										
74	Prepared by: Rod Valdepenas	Telephone No.: (415) 931-2294								Date: 5/16/17	
75	HSA-CO Review Signature:										
76	HSA #1										

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

**Nutrition Education Salaries & Benefits Detail**

TERM  
July 1, 2017 to June 30, 2020

11	12	Agency Totals		7/1/17 to 6/30/18			7/1/18 to 6/30/19			7/1/19 to 6/30/20			7/1/17 to 6/30/20		
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
13	Nutritionist	\$59,403	50%	2%	1%	\$480	\$480		\$480	\$480		\$480	\$480		\$1,440
14															
15															
16															
17															
18															
19															
20															
21															
22															
23															
24															
25															
26															
27															
28															
29															
30	TOTALS	\$59,403	50%	2%	1%	\$480	\$480		\$480	\$480		\$480	\$480		\$1,440
31	FRINGE BENEFIT RATE														
32	EMPLOYEE FRINGE BENEFITS														
33															
34															
35															
36	TOTAL SALARIES & BENEFITS	\$59,403				\$480	\$480		\$480	\$480		\$480	\$480		\$1,440
37	Program x3yrs	\$1,440													
38	HSA #2														









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

**I. Purpose**

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

**II. Definitions**

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

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

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

**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

B. Provide congregate meal services, which include:

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

Table A	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	2,304	2,304	2,304	6,912
#Meals	81,400	81,400	81,400	244,200

C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).

D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented by a RD based on the number of monitoring approved in the Grantee’s

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

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

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

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

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

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



## VIII. Monitoring Activities

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

## IX. Reporting Requirements

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

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

Tahir Shaikh  
Contract Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120

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

	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>				Appendix B, pg. 1	
2					Document Date: 5/15/2017	
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: On Lok Day Services				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)	Cong-ENP	Cong-ENP	Cong-ENP	TOTAL	Average cost/meal
9	<b>Annual #Meals Contracted</b>	81,400	81,400	81,400	244,200	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>					
12	Salaries & Benefits	\$200,202	\$200,202	\$200,202	\$600,606	\$2.46
13	Operating Expense	\$299,397	\$299,397	\$299,397	\$898,191	\$3.68
14	<b>Subtotal</b>	<b>\$499,599</b>	<b>\$499,599</b>	<b>\$499,599</b>	<b>\$1,498,797</b>	<b>\$6.14</b>
15	Indirect Percentage (max 10%)	9%	9%	9%		
16	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)	\$44,964	\$44,964	\$44,964	\$134,892	\$0.55
17	Capital Expenditure					
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$544,563</b>	<b>\$544,563</b>	<b>\$544,563</b>	<b>\$1,633,689</b>	<b>\$6.69</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits	\$279,713	\$279,713	\$279,713	\$839,140	\$3.44
22	Operating Expense	\$273,087	\$273,087	\$273,087	\$819,260	\$3.35
23	Capital Expenditure					
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$552,800</b>	<b>\$552,800</b>	<b>\$552,800</b>	<b>\$1,658,400</b>	<b>\$6.79</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$1,097,363</b>	<b>\$1,097,363</b>	<b>\$1,097,363</b>	<b>\$3,292,089</b>	<b>\$13.48</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals	\$544,563	\$544,563	\$544,563	\$1,633,689	
30	Nutrition Compliance (if your agency is requesting funds)	\$11,650	\$11,650	\$11,650	\$34,950	
31						
32						
33						
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$556,213</b>	<b>\$556,213</b>	<b>\$556,213</b>	<b>\$1,668,639</b>	
35	PER MEAL COST, HSA-DAAS	\$6.69	\$6.69	\$6.69	\$6.69	
36	Per MEAL & COMPLIANCE COST	\$6.83	\$6.83	\$6.83	\$6.83	
37	<b>Non-DAAS Revenues</b>					
38	Project Income	109,890	109,890	109,890	\$329,670	\$1.35
39	Agency Cash - Fundraising	\$291,416	\$291,416	\$291,416	\$874,248	\$3.58
40	Agency In-Kind Volunteer	\$151,494	\$151,494	\$151,494	\$454,482	\$1.86
41	Nutrition Compliance Revenues					
42						
43	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$552,800</b>	<b>\$552,800</b>	<b>\$552,800</b>	<b>\$1,658,400</b>	
44	PER MEAL COST, NON HSA-DAAS	\$6.79	\$6.79	\$6.79	\$6.79	
45	<b>TOTAL REVENUES</b>	<b>\$1,109,013</b>	<b>\$1,109,013</b>	<b>\$1,109,013</b>	<b>\$3,327,039</b>	
46	PER MEAL COST, TOTAL	\$13.62	\$13.62	\$13.62	\$13.62	
47	Full Time Equivalent (FTE)	10.48	10.48	10.48	31.45	
49	Prepared by: Valorie Villela	Phone No.: 415-220-2211		Date: 5/15/2017		
50	HSA-CO Review Signature: _____	Date: _____				
51	HSA #1	Form Rev. 12/22/16				

	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: On Lok Day Services									Appendix B, page 2
2	Program Name:	1								Date: 5/15/2017
3	Cong-ENP									
4										
5										
6										
7										
8	<b>H.S.A-DAAS</b>	<b>Salaries &amp; Benefits Detail</b>								<b>TOTAL</b>
9	POSITION TITLE and NAME	Agency Totals		For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
		Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
10	ACCOUNTANT	\$49,275	100%	20%	20%	\$10,003	\$10,003	\$10,003	\$30,009	
11	ADMINISTRATIVE SECRETARY	\$64,272	100%	8%	8%	\$5,399	\$5,399	\$5,399	\$16,197	
12	ASSISTANT DIRECTOR OF OPERATIONS	\$77,251	100%	11%	11%	\$8,111	\$8,111	\$8,111	\$24,333	
13	DIRECTOR	\$140,982	100%	8%	8%	\$11,843	\$11,843	\$11,843	\$35,529	
14	NUTRITION OPERATIONS MANAGER	\$60,008	100%	35%	35%	\$21,003	\$21,003	\$21,003	\$63,009	
15	NUTRITION PROGRAM COORDINATOR	\$36,421	100%	32%	32%	\$11,473	\$11,473	\$11,473	\$34,419	
16	HOSPITALITY COORDINATOR	\$44,990	100%	16%	16%	\$7,243	\$7,243	\$7,243	\$21,729	
17	SITE COORDINATORS (4)	\$31,591	210%	70%	147%	\$46,439	\$46,439	\$46,439	\$139,317	
18	ON CALL SITE COORDINATOR (1)	\$31,075	31%	70%	21%	\$6,661	\$6,661	\$6,661	\$19,983	
19	DRIVERS (5)	\$35,026	338%	13%	44%	\$15,324	\$15,324	\$15,324	\$45,972	
20	ON CALL DRIVERS (3)	\$35,778	48%	13%	6%	\$2,226	\$2,226	\$2,226	\$6,678	
21	VOLUNTEER PROGRAM MANAGER	\$50,877	100%	21%	21%	\$10,684	\$10,684	\$10,684	\$32,052	
22										
23										
24	TOTALS	\$ 657,548	1426%	317%	370%	\$156,409	\$156,409	\$156,409	\$469,227	
25										
26	FRINGE BENEFIT RATE	28.0%								
27	EMPLOYEE FRINGE BENEFITS	\$ 184,113				\$43,793	\$43,793	\$43,793	\$131,379	
28										
29										
30	TOTAL DAAS SALARIES & BENEFITS	\$ 841,661				\$200,202	\$200,202	\$200,202	\$600,606	
31										
32										
33	<b>Non - DAAS</b>	Agency Totals		For DAAS Meal					TOTAL	
34	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	Budgeted Salary	
35	ACCOUNTANT	\$ 49,275	100%	9%	9%	\$4,287	\$4,287	\$4,287	\$12,861	
36	ADMINISTRATIVE SECRETARY	\$ 64,272	100%	4%	4%	\$2,314	\$2,314	\$2,314	\$6,941	
37	ASSISTANT DIRECTOR OF OPERATIONS	\$ 77,251	100%	5%	5%	\$3,476	\$3,476	\$3,476	\$10,429	
38	DIRECTOR	\$ 140,982	100%	4%	4%	\$5,075	\$5,075	\$5,075	\$15,226	
39	NUTRITION OPERATIONS MANAGER	\$ 60,008	100%	15%	15%	\$9,001	\$9,001	\$9,001	\$27,004	
40	NUTRITION PROGRAM COORDINATOR	\$ 36,421	100%	14%	14%	\$4,917	\$4,917	\$4,917	\$14,750	
41	HOSPITALITY COORDINATOR	\$ 44,990	100%	7%	7%	\$3,104	\$3,104	\$3,104	\$9,313	
42	SITE COORDINATORS (4)	\$ 31,591	210%	30%	63%	\$19,902	\$19,902	\$19,902	\$59,707	
43	ON CALL SITE COORDINATOR (1)	\$ 31,075	31%	30%	9%	\$2,855	\$2,855	\$2,855	\$8,564	
44	DRIVERS (5)	\$ 35,026	338%	6%	19%	\$6,567	\$6,567	\$6,567	\$19,702	
45	ON CALL DRIVERS (3)	\$ 35,778	48%	6%	3%	\$954	\$954	\$954	\$2,862	
46	VOLUNTEER PROGRAM MANAGER	\$ 50,877	100%	9%	9%	\$4,579	\$4,579	\$4,579	\$13,737	
47	IN-KIND VOLUNTEERS (5.2)	\$ 29,120	520%	100%	520%	\$151,494	\$151,494	\$151,494	\$454,482	
48										
49										
50										
51										
52	TOTAL NON-DAAS		1946%	236%	679%	\$218,526	\$218,526	\$218,526	\$655,578	
53										
54	FRINGE BENEFIT RATE	28.0%								
55	EMPLOYEE FRINGE BENEFITS	\$ -				\$61,187	\$61,187	\$61,187	\$183,562	
56										
57										
58	TOTAL Non-DAAS SALARIES & BENEFITS	\$ -				\$279,713	\$279,713	\$279,713	\$839,140	
59										
60	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS*	\$ 841,661				\$479,915	\$479,915	\$479,915	\$1,439,745	
61	HSA #2									

Form Rev. 12/22/16

	A	B	C	D	E	F	G	H
1	Grantee's Name: On Lok Day Serv							Appendix B, page 3
2	Program Name:							Date: 5/15/2017
3	Cong-ENP							
4	<b>Operating Expense Detail</b>							
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	81,400	81,400	81,400	<b>TOTAL</b>		
8	<u>Expenditure Category</u>	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property							
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$14,060	\$14,060	\$14,060	\$42,181		
11	Office Supplies, Postage							
12	Building Maintenance Supplies and Repair		\$32,808	\$32,808	\$32,808	\$98,423		
13	<b>FOOD COSTS</b>							
14	Raw Food	per meal	\$ -					
15	Cong Food Svc Supplies	per meal	\$ -					
16	HDM Food Svc Supplies	per meal	\$ -					
17	Catered Meals	per meal	\$ 2.82	\$229,462	\$229,462	\$229,462	\$688,386	
18	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
19	Registered Dietitian		\$8,441	\$8,441	\$8,441	\$25,323		
20	Consultant-Translator							
21	Catholic Charities		\$6,347	\$6,347	\$6,347	\$19,040		
22	<b>OTHER COSTS:</b>							
23	Insurance		\$4,811	\$4,811	\$4,811	\$14,432		
24	Staff Training & Travel							
25	Rental of Equipment							
26	Small equipment & Supplies		\$652	\$652	\$652	\$1,957		
27	Auto - Fuel/Parking & Insurance		\$2,816	\$2,816	\$2,816	\$8,449		
28	Repair/Maintenance							
29	Payroll Processing							
30								
31	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$299,397</b>	<b>\$299,397</b>	<b>\$299,397</b>	<b>\$898,191</b>		
33	<b>Non-DAAS</b>							<b>TOTAL</b>
34	<u>Expenditure Category</u>							
35	Rental of Property							
36	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$12,525	\$12,525	\$12,525	\$37,574		
37	Office Supplies, Postage		\$2,438	\$2,438	\$2,438	\$7,314		
38	Building Maintenance Supplies and Repair		\$29,224	\$29,224	\$29,224	\$87,673		
39	<b>FOOD COSTS</b>							
40	Raw Food	per meal	\$ -					
41	Cong Food Svc Supplies	per meal	\$ -					
42	HDM Food Svc Supplies	per meal	\$ -					
43	Catered Meals	per meal	\$ 2.51	\$204,400	\$204,400	\$204,400	\$613,200	
44	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
45	Registered Dietitian		\$7,519	\$7,519	\$7,519	\$22,557		
46	Consultant-Translator		\$105	\$105	\$105	\$315		
47	Catholic Charities		\$5,653	\$5,653	\$5,653	\$16,960		
48	<b>OTHER COSTS:</b>							
49	Insurance		\$4,285	\$4,285	\$4,285	\$12,855		
50	Staff Training & Travel							
51	Rental of Equipment		\$2,344	\$2,344	\$2,344	\$7,031		
52	Small equipment & Supplies		\$581	\$581	\$581	\$1,743		
53	Auto - Fuel/Parking & Insurance		\$2,509	\$2,509	\$2,509	\$7,527		
54	Repair/Maintenance		\$937	\$937	\$937	\$2,810		
55	Payroll Processing		\$567	\$567	\$567	\$1,701		
57	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$273,087</b>	<b>\$273,087</b>	<b>\$273,087</b>	<b>\$819,260</b>		
58								
59	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$572,484</b>	<b>\$572,484</b>	<b>\$572,484</b>	<b>\$1,717,451</b>		
64	<b>HSA #3</b>	Form Rev. 12/22/16						

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
 BY PROGRAM**

Contractor Name: On Lok Day Services Term: July 1, 2017 to June 30, 2020

(Check One) New  Renewal  Modification

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

9	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate	REVENUE Cost Allocation:			REVENUE Cost Allocation:			REVENUE Cost Allocation:			Total Revenue
		Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Year 2	H.S.A.-DAAS	Non-HSA-DAAS	Year 3	H.S.A.-DAAS	Non-HSA-DAAS	
10	Budget Reference Page No. (s)										
11	Program Term	7/1/17-6/30/18			7/1/18-6/30/19			7/1/19-6/30/20			7/1/17 to 6/30/20
12	<b>Expenditures</b>										
13	<b>Nutrition Education</b>										
14	Salaries & Benefits										
15	Operating Expense	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$7,560
16	Subtotal Direct	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$7,560
17	Indirect Percentage	5.9%	9.0%		5.9%	9.0%		5.9%	9.0%		
18	Indirect Expense	\$149	\$149		\$149	\$149		\$149	\$149		\$447
19	<b>Total Nutrition Education</b>	<b>\$2,669</b>	<b>\$1,800</b>	<b>\$869</b>	<b>\$2,669</b>	<b>\$1,800</b>	<b>\$869</b>	<b>\$2,669</b>	<b>\$1,800</b>	<b>\$869</b>	<b>\$8,007</b>
20	<b>Nutrition Counseling</b>										
21	Salaries & Benefits										
22	Operating Expense										
23	Subtotal Direct										
24	Indirect Percentage										
25	Indirect Expense										
26	<b>Total Nutrition Counseling</b>										
27	<b>HACCP Kitchen Monitoring</b>										
28	Salaries & Benefits										
29	Operating Expense	\$2,520	\$2,271	\$249	\$2,520	\$2,271	\$249	\$2,520	\$2,271	\$249	\$7,560
30	Subtotal Direct	\$2,520	\$2,271	\$249	\$2,520	\$2,271	\$249	\$2,520	\$2,271	\$249	\$7,560
31	Indirect Percentage	8.1%	9.0%		8.1%	9.0%		8.1%	9.0%		
32	Indirect Expense	\$204	\$204		\$204	\$204		\$204	\$204		\$612
33	<b>Total HACCP Kitchen Monitoring</b>	<b>\$2,724</b>	<b>\$2,475</b>	<b>\$249</b>	<b>\$2,724</b>	<b>\$2,475</b>	<b>\$249</b>	<b>\$2,724</b>	<b>\$2,475</b>	<b>\$249</b>	<b>\$8,172</b>
34	<b>Site/Route Monitoring</b>										
35	Salaries & Benefits										
36	Operating Expense	\$6,720	\$5,505	\$1,215	\$6,720	\$5,505	\$1,215	\$6,720	\$5,505	\$1,215	\$20,160
37	Subtotal Direct	\$6,720	\$5,505	\$1,215	\$6,720	\$5,505	\$1,215	\$6,720	\$5,505	\$1,215	\$20,160
38	Indirect Percentage	7.4%	9.0%		7.4%	9.0%		7.4%	9.0%		
39	Indirect Expense	\$495	\$495		\$495	\$495		\$495	\$495		\$1,485
40	<b>Total Site/Route Monitoring</b>	<b>\$7,215</b>	<b>\$6,000</b>	<b>\$1,215</b>	<b>\$7,215</b>	<b>\$6,000</b>	<b>\$1,215</b>	<b>\$7,215</b>	<b>\$6,000</b>	<b>\$1,215</b>	<b>\$21,645</b>
41	<b>Menu Planning</b>										
42	Salaries & Benefits										
43	Operating Expense	\$1,400	\$917	\$483	\$1,400	\$917	\$483	\$1,400	\$917	\$483	\$4,200
44	Subtotal Direct	\$1,400	\$917	\$483	\$1,400	\$917	\$483	\$1,400	\$917	\$483	\$4,200
45	Indirect Percentage	5.9%	9.0%		5.9%	9.0%		5.9%	9.0%		
46	Indirect Expense	\$83	\$83		\$83	\$83		\$83	\$83		\$249
47	<b>Total Menu Planning</b>	<b>\$1,483</b>	<b>\$1,000</b>	<b>\$483</b>	<b>\$1,483</b>	<b>\$1,000</b>	<b>\$483</b>	<b>\$1,483</b>	<b>\$1,000</b>	<b>\$483</b>	<b>\$4,449</b>
48	<b>HDM Assessments</b>										
49	Salaries & Benefits										
50	Operating Expense										
51	Subtotal Direct										
52	Indirect Percentage										
53	Indirect Expense										
54	<b>Total HDM Assessments</b>										
55	<b>Other Nutrition Compliance</b>										
56	Salaries & Benefits										
57	Operating Expense	\$700	\$344	\$356	\$700	\$344	\$356	\$700	\$344	\$356	\$2,100
58	Subtotal Direct	\$700	\$344	\$356	\$700	\$344	\$356	\$700	\$344	\$356	\$2,100
59	Indirect Percentage	4.4%	9.0%		4.4%	9.0%		4.4%	9.0%		
60	Indirect Expense	\$31	\$31		\$31	\$31		\$31	\$31		\$93
61	<b>Total Other Nutrition Compliance</b>	<b>\$731</b>	<b>\$375</b>	<b>\$356</b>	<b>\$731</b>	<b>\$375</b>	<b>\$356</b>	<b>\$731</b>	<b>\$375</b>	<b>\$356</b>	<b>\$2,193</b>
62	<b>GRAND Total Expenditures</b>	<b>\$14,822</b>	<b>\$11,650</b>	<b>\$3,172</b>	<b>\$14,822</b>	<b>\$11,650</b>	<b>\$3,172</b>	<b>\$14,822</b>	<b>\$11,650</b>	<b>\$3,172</b>	<b>\$44,468</b>
63	<b>HSA Revenues</b>										
64											
65											
66	<b>TOTAL HSA REVENUES</b>										
67	<b>Other Non-H.S.A.-DAAS Revenues</b>										
68											
69											
70											
71	<b>TOTAL OTHER REVENUES</b>										
72	Full Time Equivalent (FTE)										

74 Prepared by: Valorie Villela - Director Telephone No.: (415) 550-2211 Date: 5/15/17  
 75 HSA-CO Review Signature: \_\_\_\_\_  
 76 HSA #1 \_\_\_\_\_ Document Date: 5/15/17

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	
1																						
2																						
3																						
4	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate																					
5	(Same as Line 9 on HSA #1)																					
6																						
7																						
8	<b>TERM:</b>																					
9	July 1, 2017 to June 30, 2020																					
10																						
11																						
12	<b>Expenditure Category</b>																					
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 (under \$5,000/item)																					
22	Rental of Equipment																					
23																						
24	<b>SUBCONTRACTORS Descriptive Title</b>																					
25	Registered Dietician																					
26				\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	
27																						
28																						
29																						
30	<b>OTHER</b>																					
31																						
32																						
33																						
34																						
35																						
36																						
37	<b>TOTAL OPERATING EXPENSE</b>																					
38	<b>TOTAL OPERATING EXPENSE x3yrs</b>																					
39				\$7,560	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	\$2,520	\$1,651	\$869	
	<b>TOTAL REVENUE</b>																					
	7/1/17 to 6/30/18																					
	7/1/19 to 6/30/20																					
	7/1/17 to 6/30/20																					

**Nutrition Education Operating Expense Detail**

Document Date: 5/15/17

Document Date: 5/15/17









	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1																					
2																					
3																					
4		Program: Nutrition Compliance for ENP- Indicate HDM or Congregate																			
5		(Same as Line 9 on HSA #1)																			
6																					
7																					
8																					
9		TERM																			
10		July 1, 2017 to June 30, 2020																			
11																					
12																					
13		Expenditure Category																			
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**Other Nutrition Compliance Operating Expense Detail**

Appendix B1, Page 6  
Document Date: 5/15/17

Document Date: 5/15/17

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

**I. Purpose**

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

**II. Definitions**

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

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

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

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



**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

B. Provide congregate meal services, which include:

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

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Breakfast Consumers	195	195	195	585
#Unduplicated Lunch Consumers	3,826	3,826	3,826	11,478
# of Breakfast Meals	48,831	48,831	48,831	146,493
# of Lunch/Dinner Meals	240,500	240,500	240,500	721,500

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

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

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

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

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

- D. At least 65% of consumers with a high nutrition risk score as defined by the “Determine Your Nutritional Health” checklist will be connected to additional and appropriate resources.
- E. At least 65% of consumers that are identified as” lonely” as evidenced by the DAAS adopted loneliness screening tool will be connected to additional and appropriate resources.

**VIII. Monitoring Activities**

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

**IX. Reporting Requirements**

- A. Grantee will enter into CA-GetCare data obtained from consumers using the intake form for Congregate Meals, which includes the annual Nutrition Risk Screening, the loneliness screening , and the food security questions for all enrolled consumers by the due date as specified by OOA policy and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all consumer level service units in the Service Recording Tool and data for monthly service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives.
- D. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of meals served and number of nutrition compliance units provided.
- E. Grantee will enter the annual Outcome Objective metrics identified in Section VII of the appendix A in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 (or as amended) each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.

- G. Grantee will develop and maintain its OOA approved Site Chart. The site chart may be updated with the approval of OOA. A copy of the updated Site Chart will be kept in OOA's contractor program.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- I. Grantee will provide other reports as requested. Apart from the on-line reporting via CA-GetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

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

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

	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>				Appendix B, pg. 1	
2					Document Date:	5/16/2017
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: Project Open Hand				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)	Cong-ENP	Cong-ENP	Cong-ENP	TOTAL	Average cost/meal
9	<b>Annual #Meals Contracted</b>	240,500	240,500	240,500	721,500	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>					
12	Salaries & Benefits	\$1,065,188	\$1,065,188	\$1,065,188	\$3,195,563	\$4.43
13	Operating Expense	\$544,384	\$544,384	\$544,384	\$1,633,153	\$2.26
14	<b>Subtotal</b>	<b>\$1,609,572</b>	<b>\$1,609,572</b>	<b>\$1,609,572</b>	<b>\$4,828,716</b>	<b>\$6.69</b>
15	Indirect Percentage (max 10%)					
16	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)					
17	Capital Expenditure					
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$1,609,572</b>	<b>\$1,609,572</b>	<b>\$1,609,572</b>	<b>\$4,828,716</b>	<b>\$6.69</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits	\$1,105,681	\$1,105,681	\$1,105,681	\$3,317,042	\$4.60
22	Operating Expense	\$704,813	\$704,813	\$704,813	\$2,114,440	\$2.93
23	Capital Expenditure					
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$1,810,494</b>	<b>\$1,810,494</b>	<b>\$1,810,494</b>	<b>\$5,431,481</b>	<b>\$7.53</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$3,420,066</b>	<b>\$3,420,066</b>	<b>\$3,420,066</b>	<b>\$10,260,197</b>	<b>\$14.22</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals: Local funds	\$ 964,622	\$ 964,622	\$ 964,622	\$2,893,866	
30	Meals: Federal funds	\$ 509,876	\$ 509,876	\$ 509,876	\$1,529,628	
31	Meals: State funds	\$135,074	\$135,074	\$135,074	\$405,222	
32	Nutrition Compliance (if your agency is requesting funds)	\$24,916	\$24,916	\$24,916	\$74,748	
33						
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$1,634,488</b>	<b>\$1,634,488</b>	<b>\$1,634,488</b>	<b>\$4,903,464</b>	
35	<i>PER MEAL COST, HSA-DAAS</i>	<i>\$6.69</i>	<i>\$6.69</i>	<i>\$6.69</i>	<i>\$6.69</i>	
36	<i>Per MEAL &amp; COMPLIANCE COST</i>	<i>\$6.80</i>	<i>\$6.80</i>	<i>\$6.80</i>	<i>\$6.80</i>	
37	<b>Non-DAAS Revenues</b>					
38	Project Income	93,795	93,795	93,795	\$281,385	\$0.39
39	Agency Cash - Fundraising	\$1,119,290	\$1,119,290	\$1,119,290	\$3,357,871	\$4.65
40	Agency Property	\$640,354	\$640,354	\$640,354	\$1,921,062	\$2.66
41	Agency In-Kind Volunteer	\$602,004	\$602,004	\$602,004	\$1,806,013	\$2.50
42	Nutrition Compliance Revenues					
43						
44	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$2,455,444</b>	<b>\$2,455,444</b>	<b>\$2,455,444</b>	<b>\$7,366,331</b>	
45	<i>PER MEAL COST, NON HSA-DAAS</i>	<i>\$10.21</i>	<i>\$10.21</i>	<i>\$10.21</i>	<i>\$10.21</i>	
46	<b>TOTAL REVENUES</b>	<b>\$4,089,932</b>	<b>\$4,089,932</b>	<b>\$4,089,932</b>	<b>\$12,269,795</b>	
47	<b>PER MEAL COST, TOTAL</b>	<b>\$17.01</b>	<b>\$17.01</b>	<b>\$17.01</b>	<b>\$17.01</b>	
48	Full Time Equivalent (FTE)					
50	Prepared by:		Phone No.:		Date:	
51	HSA-CO Review Signature:				Date:	
52	HSA #1		Form Rev. 12/22/16			



	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: Project Open Hand								Appendix B, page 2	
2	Program Name:								Date: 5/16/17	
3	Cong-ENP									
4										
5										
6										
7										
8	<b>H.S.A-DAAS</b>	<b>Salaries &amp; Benefits Detail</b>						<b>TOTAL</b>		
9	POSITION TITLE and NAME	Agency Totals	For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
10		Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
11	Asst Kitchen Supervisor - Open	\$35,901	100%	30%	30%	\$10,770	\$10,770	\$10,770	\$32,311	
12	Catering Cook I - Martinez, Alma	\$30,296	100%	30%	30%	\$9,089	\$9,089	\$9,089	\$27,267	
13	Chef de Cuisine - Walker, Lea	\$47,486	100%	30%	30%	\$14,246	\$14,246	\$14,246	\$42,738	
14	Cook I - Open	\$27,581	100%	30%	30%	\$8,274	\$8,274	\$8,274	\$24,823	
15	Cook I - Pensabene, Jaime	\$30,827	100%	30%	30%	\$9,248	\$9,248	\$9,248	\$27,744	
16	Cook II - Barraza, Jonny	\$31,782	100%	25%	25%	\$7,945	\$7,945	\$7,945	\$23,836	
17	Cook II - Carpio, Patrick	\$31,782	100%	10%	10%	\$3,178	\$3,178	\$3,178	\$9,534	
18	Cook II - Guinto, Fernando	\$33,712	100%	3%	3%	\$1,011	\$1,011	\$1,011	\$3,034	
19	Cook II - Ky, Bau	\$42,729	100%	15%	15%	\$6,409	\$6,409	\$6,409	\$19,228	
20	Cook II - Lastima, Christian	\$31,782	100%	8%	8%	\$2,447	\$2,447	\$2,447	\$7,342	
21	Cook II - Mcdaniel, Steven Lloyd	\$31,824	100%	30%	30%	\$9,547	\$9,547	\$9,547	\$28,642	
22	Delivery Driver - Arboleda, Steven	\$30,296	100%	15%	15%	\$4,544	\$4,544	\$4,544	\$13,633	
23	Delivery Driver - Brown, Steven	\$31,209	100%	15%	15%	\$4,681	\$4,681	\$4,681	\$14,044	
24	Exec Chef - Barrow, Adrian	\$75,000	100%	30%	30%	\$22,500	\$22,500	\$22,500	\$67,500	
25	Porter I - Viray, Francisco	\$30,827	100%	30%	30%	\$9,248	\$9,248	\$9,248	\$27,744	
26	Porter I - Wong, David	\$29,066	100%	30%	30%	\$8,720	\$8,720	\$8,720	\$26,159	
27	Site Coordinators - 28 pp.	\$538,283	1553%	66%	1022%	\$354,459	\$354,459	\$354,459	\$1,063,378	
28	Sites Manager -- Chong, Raymond	\$62,500	100%	60%	60%	\$37,500	\$37,500	\$37,500	\$112,500	
29	Sites Manager -- Withers, Gina	\$62,500	100%	50%	50%	\$31,250	\$31,250	\$31,250	\$93,750	
30	Sites Supervisor -- Giuffra, Merle	\$40,768	100%	60%	60%	\$24,461	\$24,461	\$24,461	\$73,382	
31	Sites Supervisor -- Open	\$37,440	100%	60%	60%	\$22,464	\$22,464	\$22,464	\$67,392	
32	Sites Supervisor -- Starr, Sharon	\$37,440	100%	60%	60%	\$22,464	\$22,464	\$22,464	\$67,392	
33	Sites Supervisor -- Wong, Erika	\$38,480	100%	60%	60%	\$23,088	\$23,088	\$23,088	\$69,264	
34	SLP Coordinator -- Aguilar, Miriam	\$51,792	100%	60%	60%	\$31,075	\$31,075	\$31,075	\$93,226	
35	SLP Coordinator -- Open	\$51,792	100%	65%	65%	\$33,665	\$33,665	\$33,665	\$100,994	
36	SLP Manager -- Mekler, Ariel	\$75,000	100%	65%	65%	\$48,563	\$48,563	\$48,563	\$145,688	
37	TOTALS	\$ 1,568,094	4053%	966%	1923%	\$760,848	\$760,848	\$760,848	\$2,282,545	
38	FRINGE BENEFIT RATE	40.0%								
39	EMPLOYEE FRINGE BENEFITS	\$ 627,238				\$304,339	\$304,339	\$304,339	\$913,018	
40										
41										
42	TOTAL DAAS SALARIES & BENEFITS	\$ 2,195,332				\$1,065,188	\$1,065,188	\$1,065,188	\$3,195,563	
43										
44										
45	<b>Non - DAAS</b>	<b>Agency Totals</b>						<b>TOTAL</b>		
46	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	Budgeted Salary	
47	Delivery Driver - Flores Diaz, Narciso	\$30,296	100%	56%	56%	\$16,936	\$16,936	\$16,936	\$50,807	
48	Delivery Driver - Kessel, Alfred	\$35,367	100%	56%	56%	\$19,770	\$19,770	\$19,770	\$59,310	
49	Distribution Manager - Yowell, Scott	\$63,500	100%	28%	28%	\$17,748	\$17,748	\$17,748	\$53,244	
50	HR Administrator - Pealer, Matthew	\$45,760	100%	35%	35%	\$16,016	\$16,016	\$16,016	\$48,048	
51	Kitchen Manager - Miles, Cassandra	\$62,000	100%	42%	42%	\$25,993	\$25,993	\$25,993	\$77,980	
52	Lead Driver - Baltodano, Otto	\$33,657	100%	56%	56%	\$18,814	\$18,814	\$18,814	\$56,443	
53	Lead Porter - Pryor, Gregory	\$35,285	100%	42%	42%	\$14,793	\$14,793	\$14,793	\$44,380	
54	Operation Supervisor - Gilmore, Shann	\$57,780	100%	35%	35%	\$20,187	\$20,187	\$20,187	\$60,560	
55	Operations Coordinator I - Lopez, Carl	\$33,421	100%	35%	35%	\$11,677	\$11,677	\$11,677	\$35,030	
56	Operations Coordinator III - Dennis, Ke	\$44,690	100%	35%	35%	\$15,614	\$15,614	\$15,614	\$46,841	

	A	B	C	D	E	F	G	H	I	J
57	Operations Coordinator III - Murillo, Wil	\$35,714	100%	35%	35%		\$12,477	\$12,477	\$12,477	\$37,432
58	PM Production Coordinator - Matthews,	\$33,330	100%	7%	7%		\$2,329	\$2,329	\$2,329	\$6,987
59	Porter I - Butler, Julius	\$29,066	100%	42%	42%		\$12,186	\$12,186	\$12,186	\$36,557
60	Porter I - Guinto, Ramon	\$30,827	100%	42%	42%		\$12,924	\$12,924	\$12,924	\$38,772
61	Porter I - Hamilton, Andrea	\$29,936	100%	42%	42%		\$12,550	\$12,550	\$12,550	\$37,651
62	Porter I - Open	\$28,111	100%	42%	42%		\$11,807	\$11,807	\$11,807	\$35,420
63	Porter II - O'Donoghue, Cormac	\$31,209	100%	42%	42%		\$13,084	\$13,084	\$13,084	\$39,252
64	Programs VP -- Open	\$105,000	100%	35%	35%		\$36,750	\$36,750	\$36,750	\$110,250
65	Sous Chef - Sousa, Antonio	\$40,560	100%	42%	42%		\$17,005	\$17,005	\$17,005	\$51,014
66	Staff Accountant - Ryan, Kelly	\$52,232	100%	35%	35%		\$18,281	\$18,281	\$18,281	\$54,843
67	Vol Services Coordinator - Karr, Renu	\$46,897	100%	70%	70%		\$32,828	\$32,828	\$32,828	\$98,484
68	Volunteers	\$602,004	100%	70%	70%		\$602,004	\$602,004	\$602,004	\$1,806,013
69	<b>TOTAL NON-DAAS</b>	\$ 1,506,644	2200%	923%	923%		<b>\$961,773</b>	<b>\$961,773</b>	<b>\$961,773</b>	<b>\$2,885,319</b>
70										
71	FRINGE BENEFIT RATE	40.0%								
72	EMPLOYEE FRINGE BENEFITS	\$ 361,856					\$ 143,907	\$ 143,907	\$ 143,907	\$431,722
73										
74										
75	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 1,868,500</b>					<b>\$1,105,681</b>	<b>\$1,105,681</b>	<b>\$1,105,681</b>	<b>\$3,317,042</b>
76										
77	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 4,063,832</b>					<b>\$2,170,868</b>	<b>\$2,170,868</b>	<b>\$2,170,868</b>	<b>\$6,512,605</b>
78	<b>HSA #2</b>									

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	A	B	C	D	E	F	G	H	
1	Grantee's Name: Project Open Har							Appendix B, page 3	
2	Program Name:							Date: 5/16/17	
3	Cong-ENP								
4	<b>Operating Expense Detail</b>								
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	240,500	240,500	240,500	<b>TOTAL</b>			
8	<u>Expenditure Category</u>	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20			
9	Rental of Property								
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$25,397	\$25,397	\$25,397	\$76,192			
11	Office Supplies, Postage								
12	Building Maintenance Supplies and Repair								
13	<b>FOOD COSTS</b>								
14	Raw Food	<i>per meal</i> \$ 1.91	\$459,644	\$459,644	\$459,644	\$1,378,931			
15	Cong Food Svc Supplies	<i>per meal</i> \$ 0.25	\$59,343	\$59,343	\$59,343	\$178,030			
16	HDM Food Svc Supplies	<i>per meal</i> \$ -							
17	Catered Meals	<i>per meal</i> \$ -							
18	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>								
19									
20									
21	<b>OTHER COSTS:</b>								
22	Insurance								
23	Staff Training & Travel								
24	Rental of Equipment								
25	Small equipment & Supplies								
26	Auto - Fuel & Insurance								
27	Repair/Maintenance								
28									
29									
30	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$544,384</b>	<b>\$544,384</b>	<b>\$544,384</b>	<b>\$1,633,153</b>			
32	<b>Non-DAAS</b>								
33	<b>TOTAL</b>								
33	<u>Expenditure Category</u>								
34	Rental of Property		\$640,354	\$640,354	\$640,354	\$1,921,062			
35	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$39,762	\$39,762	\$39,762	\$119,285			
36	Office Supplies, Postage		\$1,500	\$1,500	\$1,500	\$4,500			
37	Building Maintenance Supplies and Repair		\$2,625	\$2,625	\$2,625	\$7,875			
38	<b>FOOD COSTS</b>								
39	Raw Food	<i>per meal</i> \$ -							
40	Cong Food Svc Supplies	<i>per meal</i> \$ -							
41	HDM Food Svc Supplies	<i>per meal</i> \$ -							
42	Catered Meals	<i>per meal</i> \$ -							
43	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>								
44	Registered Dietitian								
45									
46	<b>OTHER COSTS:</b>								
47	Insurance								
48	Staff Training & Travel		\$6,750	\$6,750	\$6,750	\$20,250			
49	Rental of Equipment								
50	Small equipment & Supplies		\$3,750	\$3,750	\$3,750	\$11,250			
51	Auto - Fuel & Insurance		\$10,073	\$10,073	\$10,073	\$30,218			
52	Repair/Maintenance								
53									
55	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$704,813</b>	<b>\$704,813</b>	<b>\$704,813</b>	<b>\$2,114,440</b>			
57	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$1,249,198</b>	<b>\$1,249,198</b>	<b>\$1,249,198</b>	<b>\$3,747,593</b>			
62	<b>HSA #3</b>		Form Rev. 12/22/16						

	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>					Appendix Ba, pg. 1 Document Date: 5/15/2017
2						
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: Project Open Hand				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)	Cong-ENP Breakfast	Cong-ENP Breakfast	Cong-ENP Breakfast	TOTAL	Average cost/meal
9	<b>Annual #Meals Contracted</b>	<b>48,831</b>	48,831	48,831	146,493	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>					
12	Salaries & Benefits	\$80,049	\$80,049	\$80,049	\$240,148	\$1.64
13	Operating Expense	\$84,512	\$84,512	\$84,512	\$253,535	\$1.73
14	<b>Subtotal</b>	<b>\$164,561</b>	<b>\$164,561</b>	<b>\$164,561</b>	<b>\$493,684</b>	<b>\$3.37</b>
15	Indirect Percentage (max 10%)					
16	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)					
17	Capital Expenditure					
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$164,561</b>	<b>\$164,561</b>	<b>\$164,561</b>	<b>\$493,684</b>	<b>\$3.37</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits	\$108,775	\$108,775	\$108,775	\$326,324	\$2.23
22	Operating Expense	\$63,692	\$63,692	\$63,692	\$191,076	\$1.30
23	Capital Expenditure					
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$172,467</b>	<b>\$172,467</b>	<b>\$172,467</b>	<b>\$517,400</b>	<b>\$3.53</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$337,028</b>	<b>\$337,028</b>	<b>\$337,028</b>	<b>\$1,011,084</b>	<b>\$6.90</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals	\$164,561	\$164,561	\$164,561	\$493,684	
30	Nutrition Compliance (if your agency is requesting funds)					
31						
32						
33						
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$164,561</b>	<b>\$164,561</b>	<b>\$164,561</b>	<b>\$493,684</b>	
35	PER MEAL COST, HSA-DAAS	\$3.37	\$3.37	\$3.37	\$3.37	
36	Per MEAL & COMPLIANCE COST	\$3.37	\$3.37	\$3.37	\$3.37	
37	<b>Non-DAAS Revenues</b>					
38	Project Income	19,044	19,044	19,044	\$57,132	\$0.39
39	Agency Cash - Fundraising	\$52,225	\$50,562	\$48,849	\$151,636	\$1.04
40	Agency Property	\$55,437	\$57,100	\$58,813	\$171,351	\$1.17
41	Agency In-Kind Volunteer	\$45,761	\$45,761	\$45,761	\$137,282	\$0.94
42	Nutrition Compliance Revenues					
43						
44	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$172,467</b>	<b>\$172,467</b>	<b>\$172,467</b>	<b>\$517,400</b>	
45	PER MEAL COST, NON HSA-DAAS	\$3.53	\$3.53	\$3.53	\$3.53	
46	<b>TOTAL REVENUES</b>	<b>\$337,028</b>	<b>\$337,028</b>	<b>\$337,028</b>	<b>\$1,011,084</b>	
47	PER MEAL COST, TOTAL	\$6.90	\$6.90	\$6.90	\$6.90	
48	Full Time Equivalent (FTE)					
50	Prepared by:		Phone No.:		Date:	
51	HSA-CO Review Signature:				Date:	
52	HSA #1		Form Rev. 12/22/16			

	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: Project Open Hand								Appendix Ba, page 2	
2	Program Name:								Date: 5/15/17	
3	Cong-ENP Breakfast									
4										
5										
6										
7										
8	<b>H.S.A-DAAS</b>								<b>TOTAL</b>	
		Agency Totals		For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
10	Asst Kitchen Supervisor - Open	\$35,901	100%	3%	3%	\$1,182	\$1,182	\$1,182	\$3,545	
11	Catering Cook I - Martinez, Alma	\$30,296	100%	3%	3%	\$997	\$997	\$997	\$2,992	
12	Chef de Cuisine - Walker, Lea	\$47,486	100%	3%	3%	\$1,563	\$1,563	\$1,563	\$4,689	
13	Cook I - Open	\$27,581	100%	6%	6%	\$1,679	\$1,679	\$1,679	\$5,036	
14	Cook I - Pensabene, Jaime	\$30,827	100%	6%	6%	\$1,876	\$1,876	\$1,876	\$5,629	
15	Cook II - Barraza, Jonny	\$31,782	100%	3%	3%	\$1,046	\$1,046	\$1,046	\$3,138	
16	Cook II - Carpio, Patrick	\$31,782	100%	3%	3%	\$953	\$953	\$953	\$2,860	
17	Cook II - Guinto, Fernando	\$33,712	100%	6%	6%	\$2,052	\$2,052	\$2,052	\$6,156	
18	Cook II - Ky, Bau	\$42,729	100%	3%	3%	\$1,282	\$1,282	\$1,282	\$3,846	
19	Cook II - Lastima, Christian	\$31,782	100%	3%	3%	\$953	\$953	\$953	\$2,860	
20	Cook II - Mcdaniel, Steven Lloyd	\$31,824	100%	3%	3%	\$955	\$955	\$955	\$2,864	
21	Delivery Driver - Brown, Steven	\$31,209	100%	3%	3%	\$936	\$936	\$936	\$2,809	
22	Exec Chef - Barrow, Adrian	\$75,000	100%	3%	3%	\$2,469	\$2,469	\$2,469	\$7,406	
23	Site Coordinators - 9 pp.	\$206,958	610%	8%	48%	\$16,350	\$16,350	\$16,350	\$49,049	
24	Sites Manager -- Chong, Raymond	\$62,500	100%	5%	5%	\$3,188	\$3,188	\$3,188	\$9,563	
25	Sites Manager -- Withers, Gina	\$62,500	100%	5%	5%	\$3,063	\$3,063	\$3,063	\$9,188	
26	Sites Supervisor -- Giuffra, Merle	\$40,768	100%	5%	5%	\$2,038	\$2,038	\$2,038	\$6,115	
27	Sites Supervisor -- Open	\$37,440	100%	5%	5%	\$1,872	\$1,872	\$1,872	\$5,616	
28	Sites Supervisor -- Starr, Sharon	\$37,440	100%	5%	5%	\$1,872	\$1,872	\$1,872	\$5,616	
29	Sites Supervisor -- Wong, Erika	\$38,480	100%	5%	5%	\$1,924	\$1,924	\$1,924	\$5,772	
30	SLP Coordinator -- Aguilar, Miriam	\$51,792	100%	5%	5%	\$2,590	\$2,590	\$2,590	\$7,769	
31	SLP Coordinator -- Open	\$51,792	100%	5%	5%	\$2,590	\$2,590	\$2,590	\$7,769	
32	SLP Manager -- Mekler, Ariel	\$75,000	100%	5%	5%	\$3,750	\$3,750	\$3,750	\$11,250	
33	TOTALS	\$ 1,146,580	2810%	103%	143%	\$57,178	\$57,178	\$57,178	\$171,534	
34										
35	FRINGE BENEFIT RATE	40.0%								
36	EMPLOYEE FRINGE BENEFITS	\$ 458,632				\$22,871	\$22,871	\$22,871	\$68,614	
37										
38										
39	TOTAL DAAS SALARIES & BENEFITS	\$ 1,605,212				\$80,049	\$80,049	\$80,049	\$240,148	
40										
41										
42	<b>Non - DAAS</b>								<b>TOTAL</b>	
		Agency Totals		For DAAS Meal						
43	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	Budgeted Salary	
44	Delivery Driver - Arboleda, Steven	\$30,296	100%	3%	3%	\$968	\$968	\$968	\$2,903	
45	Delivery Driver - Flores Diaz, Narciso	\$30,296	100%	6%	6%	\$1,935	\$1,935	\$1,935	\$5,806	
46	Delivery Driver - Kessel, Alfred	\$35,367	100%	6%	6%	\$2,259	\$2,259	\$2,259	\$6,778	
47	Distribution Manager - Yowell, Scott	\$63,500	100%	3%	3%	\$2,028	\$2,028	\$2,028	\$6,085	
48	HR Administrator - Pealer, Matthew	\$45,760	100%	4%	4%	\$1,830	\$1,830	\$1,830	\$5,491	
49	Kitchen Manager - Miles, Cassandra	\$62,000	100%	5%	5%	\$2,971	\$2,971	\$2,971	\$8,912	
50	Lead Driver - Baltodano, Otto	\$33,657	100%	6%	6%	\$2,150	\$2,150	\$2,150	\$6,451	
51	Lead Porter - Pryor, Gregory	\$35,285	100%	5%	5%	\$1,691	\$1,691	\$1,691	\$5,072	
52	Operation Supervisor - Gilmore, Shann	\$57,780	100%	4%	4%	\$2,307	\$2,307	\$2,307	\$6,921	
53	Operations Coordinator I - Lopez, Carlo	\$33,421	100%	4%	4%	\$1,334	\$1,334	\$1,334	\$4,003	
54	Operations Coordinator III - Dennis, Ke	\$44,690	100%	4%	4%	\$1,784	\$1,784	\$1,784	\$5,353	
55	Operations Coordinator III - Murillo, Wil	\$35,714	100%	4%	4%	\$1,426	\$1,426	\$1,426	\$4,278	
56	PM Production Coordinator - Matthews,	\$33,330	100%	1%	1%	\$266	\$266	\$266	\$798	

	A	B	C	D	E	F	G	H	I	J
57	Porter I - Butler, Julius	\$29,066	100%	5%	5%		\$1,393	\$1,393	\$1,393	\$4,178
58	Porter I - Guinto, Ramon	\$30,827	100%	5%	5%		\$1,477	\$1,477	\$1,477	\$4,431
59	Porter I - Hamilton, Andrea	\$29,936	100%	5%	5%		\$1,434	\$1,434	\$1,434	\$4,303
60	Porter I - Open	\$28,111	100%	5%	5%		\$1,406	\$1,406	\$1,406	\$4,217
61	Porter I - Viray, Francisco	\$30,827	100%	5%	5%		\$1,477	\$1,477	\$1,477	\$4,431
62	Porter I - Wong, David	\$29,066	100%	5%	5%		\$1,393	\$1,393	\$1,393	\$4,178
63	Porter II - O'Donoghue, Cormac	\$31,209	100%	5%	5%		\$1,495	\$1,495	\$1,495	\$4,486
64	Programs VP -- Open	\$105,000	100%	4%	4%		\$4,200	\$4,200	\$4,200	\$12,600
65	Sous Chef - Sousa, Antonio	\$40,560	100%	5%	5%		\$1,943	\$1,943	\$1,943	\$5,830
66	Staff Accountant - Ryan, Kelly	\$52,232	100%	4%	4%		\$2,089	\$2,089	\$2,089	\$6,268
67	Vol Services Coordinator - Karir, Renu	\$46,897	100%	8%	8%		\$3,752	\$3,752	\$3,752	\$11,255
68	Volunteers	\$45,761	100%	8%	8%		\$45,761	\$45,761	\$45,761	\$137,282
69	<b>TOTAL NON-DAAS</b>	\$ 1,040,589	2500%	118%	118%		<b>\$90,771</b>	<b>\$90,771</b>	<b>\$90,771</b>	<b>\$272,312</b>
70										
71	FRINGE BENEFIT RATE	40.0%								
72	EMPLOYEE FRINGE BENEFITS	\$ 397,931					\$ 18,004	\$ 18,004	\$ 18,004	\$54,012
73										
74										
75	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 1,438,521</b>					<b>\$108,775</b>	<b>\$108,775</b>	<b>\$108,775</b>	<b>\$326,324</b>
76										
77	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	<b>\$ 3,043,733</b>					<b>\$188,824</b>	<b>\$188,824</b>	<b>\$188,824</b>	<b>\$566,472</b>
78	<b>HSA #2</b>									

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	A	B	C	D	E	F	G	H
1	Grantee's Name: Project Open Har						Appendix Ba, page 3	
2	Program Name:						Date: 5/15/17	
3	<b>Cong-ENP Breakfast</b>							
4	<b>Operating Expense Detail</b>							
5								
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	48,831	48,831	48,831	<b>TOTAL</b>		
8	<u>Expenditure Category</u>	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property							
10	Utilities(Elec, Water, Gas, Phone, Scavenger)							
11	Office Supplies, Postage							
12	Building Maintenance Supplies and Repair							
13	<b>FOOD COSTS</b>							
14	Raw Food	<i>per meal</i> \$ 1.53	\$74,721	\$74,721	\$74,721	\$224,162		
15	Cong Food Svc Supplies	<i>per meal</i> \$ 0.20	\$9,791	\$9,791	\$9,791	\$29,373		
16	HDM Food Svc Supplies	<i>per meal</i> \$ -						
17	Catered Meals	<i>per meal</i> \$ -						
18	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
19								
20								
21	<b>OTHER COSTS:</b>							
22	Insurance							
23	Staff Training & Travel							
24	Rental of Equipment							
25	Small equipment & Supplies							
26	Auto - Fuel & Insurance							
27	Repair/Maintenance							
28								
29								
30	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$84,512</b>	<b>\$84,512</b>	<b>\$84,512</b>	<b>\$253,535</b>		
32	<b>Non-DAAS</b>						<b>TOTAL</b>	
33	<u>Expenditure Category</u>							
34	Rental of Property		\$55,437	\$55,437	\$55,437	\$166,311		
35	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$5,950	\$5,950	\$5,950	\$17,850		
36	Office Supplies, Postage		\$140	\$140	\$140	\$420		
37	Building Maintenance Supplies and Repair		\$245	\$245	\$245	\$735		
38	<b>FOOD COSTS</b>							
39	Raw Food	<i>per meal</i> \$ -						
40	Cong Food Svc Supplies	<i>per meal</i> \$ -						
41	HDM Food Svc Supplies	<i>per meal</i> \$ -						
42	Catered Meals	<i>per meal</i> \$ -						
43	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
44	Registered Dietitian							
45								
46	<b>OTHER COSTS:</b>							
47	Insurance							
48	Staff Training & Travel		\$630	\$630	\$630	\$1,890		
49	Rental of Equipment							
50	Small equipment & Supplies		\$350	\$350	\$350	\$1,050		
51	Auto - Fuel & Insurance		\$940	\$940	\$940	\$2,820		
52	Repair/Maintenance							
53								
55	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$63,692</b>	<b>\$63,692</b>	<b>\$63,692</b>	<b>\$191,076</b>		
57	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$148,204</b>	<b>\$148,204</b>	<b>\$148,204</b>	<b>\$444,612</b>		
62	<b>HSA #3</b>		Form Rev. 12/22/16					

	A	B	C	D	E	F	G	H	I	J	K
1	Appendix Ba-2, Page 1										
2	Document Date: 5/15/2017										
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>										
4	<b>BY PROGRAM</b>										
5	Contractor Name:						Term				
6	Project Open Hand						July 1, 2017 to June 30, 2020				
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	Nutrition Compliance for ENP Congregate	REVENUE Cost Allocation:			REVENUE Cost Allocation:			REVENUE Cost Allocation:			
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Year 2	H.S.A.-DAAS	Non-HSA-DAAS	Year 3	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/17-6/30/18			7/1/18-6/30/19			7/1/19-6/30/20			7/1/17 to 6/30/20
12	<b>Expenditures</b>										
13	<b>Nutrition Education</b>										
14	Salaries & Benefits	\$8,518	\$1,980	\$6,538	\$8,518	\$1,980	\$6,538	\$8,518	\$1,980	\$6,538	\$25,553
15	Operating Expense										
16	Subtotal Direct	\$8,518	\$1,980	\$6,538	\$8,518	\$1,980	\$6,538	\$8,518	\$1,980	\$6,538	\$25,553
17	Indirect Percentage										
18	Indirect Expense										
19	<b>Total Nutrition Education</b>	<b>\$8,518</b>	<b>\$1,980</b>	<b>\$6,538</b>	<b>\$8,518</b>	<b>\$1,980</b>	<b>\$6,538</b>	<b>\$8,518</b>	<b>\$1,980</b>	<b>\$6,538</b>	<b>\$25,553</b>
20	<b>HACCP Kitchen Monitoring</b>										
21	Salaries & Benefits	\$9,500	\$2,636	\$6,864	\$9,500	\$2,636	\$6,864	\$9,500	\$2,636	\$6,864	\$28,501
22	Operating Expense										
23	Subtotal Direct	\$9,500	\$2,636	\$6,864	\$9,500	\$2,636	\$6,864	\$9,500	\$2,636	\$6,864	\$28,501
24	Indirect Percentage										
25	Indirect Expense										
26	<b>Total HACCP Kitchen Monitoring</b>	<b>\$9,500</b>	<b>\$2,636</b>	<b>\$6,864</b>	<b>\$9,500</b>	<b>\$2,636</b>	<b>\$6,864</b>	<b>\$9,500</b>	<b>\$2,636</b>	<b>\$6,864</b>	<b>\$28,501</b>
27	<b>Site/Route Monitoring</b>										
28	Salaries & Benefits	\$17,500	\$16,500	\$1,000	\$17,500	\$16,500	\$1,000	\$17,500	\$16,500	\$1,000	\$52,500
29	Operating Expense										
30	Subtotal Direct	\$17,500	\$16,500	\$1,000	\$17,500	\$16,500	\$1,000	\$17,500	\$16,500	\$1,000	\$52,500
31	Indirect Percentage										
32	Indirect Expense										
33	<b>Total Site/Route Monitoring</b>	<b>\$17,500</b>	<b>\$16,500</b>	<b>\$1,000</b>	<b>\$17,500</b>	<b>\$16,500</b>	<b>\$1,000</b>	<b>\$17,500</b>	<b>\$16,500</b>	<b>\$1,000</b>	<b>\$52,500</b>
34	<b>Menu Planning</b>										
35	Salaries & Benefits	\$14,742	\$3,080	\$11,662	\$14,742	\$3,080	\$11,662	\$14,742	\$3,080	\$11,662	\$44,226
36	Operating Expense										
37	Subtotal Direct	\$14,742	\$3,080	\$11,662	\$14,742	\$3,080	\$11,662	\$14,742	\$3,080	\$11,662	\$44,226
38	Indirect Percentage										
39	Indirect Expense										
40	<b>Total Menu Planning</b>	<b>\$14,742</b>	<b>\$3,080</b>	<b>\$11,662</b>	<b>\$14,742</b>	<b>\$3,080</b>	<b>\$11,662</b>	<b>\$14,742</b>	<b>\$3,080</b>	<b>\$11,662</b>	<b>\$44,226</b>
41	<b>Other Nutrition Compliance</b>										
42	Salaries & Benefits	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$3,014
43	Operating Expense										
44	Subtotal Direct	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$3,014
45	Indirect Percentage										
46	Indirect Expense										
47	<b>Total Other Nutrition Compliance</b>	<b>\$1,005</b>	<b>\$720</b>	<b>\$285</b>	<b>\$1,005</b>	<b>\$720</b>	<b>\$285</b>	<b>\$1,005</b>	<b>\$720</b>	<b>\$285</b>	<b>\$3,014</b>
48	<b>GRAND Total Expenditures</b>	<b>\$51,265</b>	<b>\$24,916</b>	<b>\$26,349</b>	<b>\$51,265</b>	<b>\$24,916</b>	<b>\$26,349</b>	<b>\$51,265</b>	<b>\$24,916</b>	<b>\$26,349</b>	<b>\$153,794</b>
49	<b>HSA Revenues</b>										
50											
51											
52	<b>TOTAL HSA REVENUES</b>										
53	<b>Other Non-H.S.A.-DAAS Revenues</b>										
54											
55											
56											
57	<b>TOTAL OTHER REVENUES</b>										
58	Full Time Equivalent (FTE)										
60	Prepared by:	Telephone No.:								Date	
61	HSA-CO Review Signature: _____										
62	HSA #1 _____ Document Date: 5/15/2017										







A	B	C	D	E	F	G	H	I	J	K	L	M	N	O														
1	Appendix Ba-2, Page 3																											
2	Document Date: 5/15/2017																											
3	<p style="text-align: center;"><b>HACCP Kitchen Monitoring Salaries &amp; Benefits Detail</b></p>																											
4															Nutrition Compliance for ENP Congregate													
5															(Same as Line 9 on HSA #1)													
6																												
7															8. TERM													
8															9. July 1, 2017 to June 30, 2020													
10																												
11	Agency Totals		Program	REVENUE Cost Allocation:		7/1/18-6/30/19		7/1/19-6/30/20		7/1/17 to 6/30/20		Total Revenue																
12	Annual Full Time Salary for FTE	Total % FTE	Program	Adjusted FTE	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue															
13	\$62,400	100%	11%	11%	\$1,883	\$4,903	\$6,786	\$1,883	\$4,903	\$6,786	\$1,883	\$4,903	\$20,358															
14																												
15																												
16																												
17	\$62,400	1.00	11%	11%	\$1,883	\$4,903	\$6,786	\$1,883	\$4,903	\$6,786	\$1,883	\$4,903	\$20,358															
18																												
19	40%																											
20	\$24,960				\$753	\$1,961	\$2,714	\$753	\$1,961	\$2,714	\$753	\$1,961	\$8,143															
21																												
22																												
23	\$87,360				\$2,636	\$6,864	\$9,500	\$2,636	\$6,864	\$9,500	\$2,636	\$6,864	\$28,501															
24	\$28,501																											
25	HSA #6																											

Document Date: 5/15/2017

Site or Route Monitoring Salaries & Benefits Detail

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

8 TERM  
 9 July 1, 2017 to June 30, 2020

A	B	C	D	E	F	G	H	I	J	K	7/1/19-6/30/20		Total Revenue
											7/1/17-6/30/18	7/1/18-6/30/19	
Agency Totals		For HSA Program	For HSA Program	Adjusted	For HSA Program	REVENUE Cost Allocation	Non-HSA-DAAS	Budgeted Salary	REVENUE Cost Allocation	Non-HSA-DAAS	For HSA Program	REVENUE Cost Allocation	Non-HSA-DAAS
Annual Full Time Salary for FTE	Total % FTE	% FTE	FTE	FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS
\$62,500	100%	20%	20%	20%	\$12,500	\$11,786	\$714	\$12,500	\$11,786	\$714	\$12,500	\$11,786	\$714
\$62,500	100%	20%	20%	20%	\$12,500	\$11,786	\$714	\$12,500	\$11,786	\$714	\$12,500	\$11,786	\$714
40%													
\$25,000					\$5,000	\$4,714	\$286	\$5,000	\$4,714	\$286	\$5,000	\$4,714	\$286
\$87,500					\$17,500	\$16,500	\$1,000	\$17,500	\$16,500	\$1,000	\$17,500	\$16,500	\$1,000
\$52,500													
TOTALS													\$37,500
FRINGE BENEFIT RATE													
EMPLOYEE FRINGE BENEFITS													\$15,000
TOTAL SALARIES & BENEFITS													\$52,500
HAS Program x3yrs													
HSA #8													

Document Date: 5/15/2017

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Appendix Ba-2, Page 5														
2	Document Date: 5/15/2017														
3															
4	Nutrition Compliance for ENP Congregate														
5	(Same as Line 9 on HSA #1)														
6															
7															
8	<b>TERM</b>														
9	July 1, 2017 to June 30, 2020														
10															
11															
		Agency Totals		For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program	For HSA Program
		Annual Full Time Salary for FTE	Total % FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	Total Revenue
12	POSITION TITLE														
13	Registered Dietitian - Friesen, Kristi	\$62,400	100%	17%	\$10,530	\$2,200	\$8,330	\$10,530	\$2,200	\$8,330	\$10,530	\$2,200	\$8,330	\$10,530	\$31,590
14															
15															
16															
17															
18	TOTALS	\$62,400	100%	17%	\$10,530	\$2,200	\$8,330	\$10,530	\$2,200	\$8,330	\$10,530	\$2,200	\$8,330	\$10,530	\$31,590
19															
20	FRINGE BENEFIT RATE	40%													
21	EMPLOYEE FRINGE BENEFITS	\$24,960			\$4,212	\$880	\$3,332	\$4,212	\$880	\$3,332	\$4,212	\$880	\$3,332	\$4,212	\$12,636
22															
23															
24	TOTAL SALARIES & BENEFITS	\$87,360			\$14,742	\$3,080	\$11,662	\$14,742	\$3,080	\$11,662	\$14,742	\$3,080	\$11,662	\$14,742	\$44,226
25	TOTAL SALARIES & BENEFITS for H.S.A Program x3yrs	\$44,226													
26	HSA #10	Document Date: 5/15/2017													

**Other Nutrition Compliance Salaries & Benefits Detail**

3 Nutrition Compliance for ENP Congregate  
 4 (Same as Line 9 on HSA #1)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O													
															7/1/17-6/30/18	7/1/18-6/30/19	7/1/19-6/30/20	7/1/17 to 6/30/20									
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		
		Agency Totals		For HSA Program		REVENUE Cost Allocation:		For HSA Program		REVENUE Cost Allocation:		For HSA Program		REVENUE Cost Allocation:		For HSA Program		REVENUE Cost Allocation:		For HSA Program		Total Revenue					
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
13	Registered Dietitian - Friesen, Kristi	\$62,400	100%	1%	1%	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$2,153
18	TOTALS	\$62,400	100%	1%	1%	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$718	\$514	\$203	\$2,153
20	FRINGE BENEFIT RATE	40%																									
21	EMPLOYEE FRINGE BENEFITS	\$24,960				\$287	\$206	\$81	\$287	\$206	\$81	\$287	\$206	\$81	\$287	\$206	\$81	\$287	\$206	\$81	\$287	\$206	\$81	\$287	\$206	\$81	\$861
24	TOTAL SALARIES & BENEFITS	\$87,360				\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$1,005	\$720	\$285	\$3,014
25	TOTAL SALARIES & BENEFITS for H.S.A Program x3yrs	\$3,014																									

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

**I. Purpose**

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

**II. Definitions**

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

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

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



**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

B. Provide congregate meal services, which include:

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

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
#Unduplicated Consumers	470	470	470	1410
#Meals	32,003	32,003	32,003	96,009

C. Ensure central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).

D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented by a RD based on the number of monitoring approved in the Grantee’s

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

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

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

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

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

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

## **VIII. Monitoring Activities**

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

## **IX. Reporting Requirements**

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

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

Drake Herrador  
Contract Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120

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

	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>				Appendix B, pg. 1	
2					Document Date:	5/15/2017
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: RUSSIAN AMERICAN COMMUNITY SERVICES				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Congregate - ENP	Cong-ENP	Cong-ENP	Cong-ENP	TOTAL	Average cost/meal
9	<b>Annual #Meals Contracted</b>	32,003	32,003	32,003	96,009	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>					
12	Salaries & Benefits	\$144,947	\$144,947	\$144,947	\$434,840	\$4.53
13	Operating Expense	\$70,113	\$70,113	\$70,113	\$210,339	\$2.19
14	<b>Subtotal</b>	<b>\$215,060</b>	<b>\$215,060</b>	<b>\$215,060</b>	<b>\$645,179</b>	<b>\$6.72</b>
15	Indirect Percentage (max 10%)					
16	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)					
17	Capital Expenditure					
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$215,060</b>	<b>\$215,060</b>	<b>\$215,060</b>	<b>\$645,179</b>	<b>\$6.72</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits	\$23,173	\$23,173	\$23,173	\$69,518	\$0.72
22	Operating Expense	\$92,164	\$92,164	\$92,164	\$276,492	\$2.88
23	Capital Expenditure					
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$115,337</b>	<b>\$115,337</b>	<b>\$115,337</b>	<b>\$346,010</b>	<b>\$3.60</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$330,396</b>	<b>\$330,396</b>	<b>\$330,396</b>	<b>\$991,189</b>	<b>\$10.32</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals	\$215,060	\$215,060	\$215,060	\$645,179	
30	Nutrition Compliance (if your agency is requesting funds)					
31						
32						
33						
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$215,060</b>	<b>\$215,060</b>	<b>\$215,060</b>	<b>\$645,179</b>	
35	PER MEAL COST, HSA-DAAS	\$6.72	\$6.72	\$6.72	\$6.72	
36	Per MEAL & COMPLIANCE COST	\$6.72	\$6.72	\$6.72	\$6.72	
37	<b>Non-DAAS Revenues</b>					
38	Project Income	36,000	36,000	36,000	\$108,000	\$1.12
39	Agency Cash - Fundraising	\$8,164	\$8,164	\$8,164	\$24,492	\$0.26
40	Agency In-Kind Volunteer	\$23,173	\$23,173	\$23,173	\$69,519	\$0.72
41	Nutrition Compliance Revenues					
42	In-Kind Rent	\$48,000	\$48,000	\$48,000	\$144,000	
43	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$115,337</b>	<b>\$115,337</b>	<b>\$115,337</b>	<b>\$346,011</b>	
44	PER MEAL COST, NON HSA-DAAS	\$3.60	\$3.60	\$3.60	\$3.60	
45	<b>TOTAL REVENUES</b>	<b>\$330,397</b>	<b>\$330,397</b>	<b>\$330,397</b>	<b>\$991,190</b>	
46	PER MEAL COST, TOTAL	\$10.32	\$10.32	\$10.32	\$10.32	
47	Full Time Equivalent (FTE)					
49	Prepared by: Eric Ha, Nick Buick		Phone No.: 415.387.5336		Date: 05/11/2017	
50	HSA-CO Review Signature:				Date:	

	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: RUSSIAN AMERICAN COMMUNITY SERVICES								Appendix B, page 2	
2	Program Name:								Date: 5/15/17	
3	Cong-ENP									
4										
5	<b>Salaries &amp; Benefits Detail</b>									
6										
7										
8	<b>H.S.A-DAAS</b>								<b>TOTAL</b>	
		Agency Totals		For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
10	Executive Director	\$66,000	100.00%	27.65%	27.65%	\$18,249	\$18,249	\$18,249	\$54,747	
11	Site Hostess	\$30,000	50.00%	100.00%	50.00%	\$15,000	\$15,000	\$15,000	\$45,000	
12	Site Manager	\$30,000	93.75%	100.00%	93.75%	\$28,125	\$28,125	\$28,125	\$84,375	
13	Cook I	\$39,520	100.00%	50.27%	50.27%	\$19,867	\$19,867	\$19,867	\$59,600	
14	Cook II	\$33,280	100.00%	50.27%	50.27%	\$16,730	\$16,730	\$16,730	\$50,190	
15	Cook III (Relief)	\$30,000	50.00%	50.27%	25.14%	\$7,541	\$7,541	\$7,541	\$22,622	
16	Kitchen Aide	\$30,000	87.50%	70.00%	61.25%	\$18,375	\$18,375	\$18,375	\$55,125	
17										
18	<b>TOTALS</b>	\$ 258,800	581%	421%	331%	\$123,886	\$123,886	\$123,886	\$371,658	
19										
20	FRINGE BENEFIT RATE	17.0%								
21	EMPLOYEE FRINGE BENEFITS	\$ 43,996				\$21,061	\$21,061	\$21,061	\$63,182	
22										
23										
24	<b>TOTAL DAAS SALARIES &amp; BENEFITS</b>	\$ 302,796				\$144,947	\$144,947	\$144,947	\$434,840	
25										
26										
27	<b>Non - DAAS</b>								<b>TOTAL</b>	
		Agency Totals		For DAAS Meal						
28	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	Budgeted Salary	
29	Kitchen Volunteers	\$29,120	100%	80%	80%	\$23,173	\$23,173	\$23,173	\$69,518	
30										
31										
32										
33										
34										
35										
36										
37										
38										
39										
40										
41										
42										
43										
44										
45										
46	<b>TOTAL NON-DAAS</b>	\$ 29,120	100%	80%	80%	\$23,173	\$23,173	\$23,173	\$69,518	
47										
48	FRINGE BENEFIT RATE									
49	EMPLOYEE FRINGE BENEFITS	\$ -								
50										
51										
52	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 29,120				\$23,173	\$23,173	\$23,173	\$69,518	
53										
54	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 331,916				\$168,119	\$168,119	\$168,119	\$504,358	
55	HSA #2									



	A	B	C	D	E	F	G	H
1	Grantee's Name: RUSSIAN AMER							Appendix B, page 3
2	Program Name:							Date: 5/15/17
3	Cong-ENP							
4	<b>Operating Expense Detail</b>							
5								
6								
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	32,003	32,003	32,003	<b>TOTAL</b>		
8	<u>Expenditure Category</u>	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property							
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$8,357	\$8,357	\$8,357	\$25,071		
11	Office Supplies, Postage		\$3,186	\$3,186	\$3,186	\$9,558		
12	Building Maintenance Supplies and Repair		\$3,000	\$3,000	\$3,000	\$9,000		
13	<b>FOOD COSTS</b>							
14	Raw Food	per meal \$ 1.25	\$40,004	\$40,004	\$40,004	\$120,011		
15	Cong Food Svc Supplies	per meal \$ 0.12	\$3,840	\$3,840	\$3,840	\$11,521		
16	HDM Food Svc Supplies	per meal \$ -						
17	Catered Meals	per meal \$ -						
18	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
19	Registered Dietitian							
20								
21	<b>OTHER COSTS:</b>							
22	Insurance		\$4,000	\$4,000	\$4,000	\$12,000		
23	Staff Training & Travel		\$2,426	\$2,426	\$2,426	\$7,278		
24	Rental of Equipment		\$2,000	\$2,000	\$2,000	\$6,000		
25	Small equipment & Supplies		\$3,300	\$3,300	\$3,300	\$9,900		
26	Auto - Fuel & Insurance							
27	Repair/Maintenance							
28								
29								
30	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$70,113</b>	<b>\$70,113</b>	<b>\$70,113</b>	<b>\$210,339</b>		
31								
32	<b>Non-DAAS TOTAL</b>							
33	<u>Expenditure Category</u>							
34	Rental of Property		\$48,000	\$48,000	\$48,000	\$144,000		
35	Utilities(Elec, Water, Gas, Phone, Scavenger)							
36	Office Supplies, Postage							
37	Building Maintenance Supplies and Repair							
38	<b>FOOD COSTS</b>							
39	Raw Food	per meal \$ 1.38	\$44,164	\$44,164	\$44,164	\$132,492		
40	Cong Food Svc Supplies	per meal \$ -						
41	HDM Food Svc Supplies	per meal \$ -						
42	Catered Meals	per meal \$ -						
43	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
44	Registered Dietitian							
45								
46	<b>OTHER COSTS:</b>							
47	Insurance							
48	Staff Training & Travel							
49	Rental of Equipment							
50	Rental of Equipment							
51	Small equipment & Supplies							
52	Auto - Fuel & Insurance							
53	Repair/Maintenance							
54								
55								
56	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$92,164</b>	<b>\$92,164</b>	<b>\$92,164</b>	<b>\$276,492</b>		
57								
58	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$162,277</b>	<b>\$162,277</b>	<b>\$162,277</b>	<b>\$486,832</b>		
59								
60								
61								
62								
63	<b>HSA #3</b>							



**Appendix A - Services to be Provided  
Self-Help for the Elderly**

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

**I. Purpose**

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

**II. Definitions**

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

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

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

**III. Target Population**

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

**IV. Eligibility for Services**

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

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

**V. Services to be Provided**

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

B. Provide congregate meal services, which include:

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

<b>Table A</b>	FY 2017-18	FY 2018-19	FY 2019-20	Total 3-years
a) Annual #Unduplicated Consumers (Regular)	5,120	5,120	5,120	15,360
b) Annual #Meals	223,913	223,913	223,913	671,739
c) CHAMPSS #Undup. Consumers	3,800	3,800	3,800	11,400
d) CHAMPSS Annual #Meals	59,420	59,420	59,420	178,260
e) Total #Undup. Consumers				
f) Total #Meals	283,333	283,333	283,333	849,999

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

**VI. Service Objectives**

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

**VII. Outcome Objectives**

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

- D. At least 65% of consumers with a high nutrition risk score as defined by the “Determine Your Nutritional Health” checklist will be connected to additional and appropriate resources.
- E. At least 65% of consumers that are identified as” lonely” as evidenced by the DAAS adopted loneliness screening tool will be connected to additional and appropriate resources.

**VIII. Monitoring Activities**

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

**IX. Reporting Requirements**

- A. Grantee will enter into CA-GetCare data obtained from consumers using the intake form for Congregate Meals, which includes the annual Nutrition Risk Screening, the loneliness screening , and the food security questions for all enrolled consumers by the due date as specified by OOA policy and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all consumer level service units in the Service Recording Tool and data for monthly service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives.
- D. Grantee will enter the following monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month: Number of meals served and number of nutrition compliance units provided.
- E. Grantee will enter the annual Outcome Objective metrics identified in Section VII of the appendix A in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 (or as amended) each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.

- G. Grantee will develop and maintain its OOA approved Site Chart. The site chart may be updated with the approval of OOA. A copy of the updated Site Chart will be kept in OOA's contractor program.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- I. Grantee will provide other reports as requested. Apart from the on-line reporting via Ca-GetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

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	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>				Appendix B, pg. 1	
2					Document Date: 5/10/2017	
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: SELF-HELP FOR THE ELDERLY				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)	CONG-ENP	CONG-ENP	CONG-ENP	TOTAL	Average cost/meal
9	<b>Annual #Meals Contracted</b>	223,913	223,913	223,913	671,739	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>					
12	Salaries & Benefits	\$560,760	\$560,760	\$560,760	\$1,682,280	\$2.50
13	Operating Expense	\$801,035	\$801,035	\$801,035	\$2,403,105	\$3.58
14	<b>Subtotal</b>	<b>\$1,361,795</b>	<b>\$1,361,795</b>	<b>\$1,361,795</b>	<b>\$4,085,385</b>	<b>\$6.08</b>
15	Indirect Percentage (max 10%)	10%	10%	10%		
16	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)	\$136,180	\$136,180	\$136,180	\$408,540	\$0.61
17	Capital Expenditure					
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$1,497,975</b>	<b>\$1,497,975</b>	<b>\$1,497,975</b>	<b>\$4,493,925</b>	<b>\$6.69</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits	\$130,039	\$130,039	\$130,039	\$390,117	\$0.58
22	Operating Expense	\$357,014	\$357,014	\$357,014	\$1,071,043	\$1.59
23	Capital Expenditure					
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$487,053</b>	<b>\$487,053</b>	<b>\$487,053</b>	<b>\$1,461,160</b>	<b>\$2.18</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$1,985,028</b>	<b>\$1,985,028</b>	<b>\$1,985,028</b>	<b>\$5,955,085</b>	<b>\$8.87</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals: Local Funds	\$988,099	\$988,099	\$988,099	\$2,964,297	
30	Meals: Federal funds	\$509,876	\$509,876	\$509,876	\$1,529,628	
31						
32	Nutrition Compliance (if your agency is requesting funds)	\$23,535	\$23,535	\$23,535	\$70,605	
33	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$1,521,510</b>	<b>\$1,521,510</b>	<b>\$1,521,510</b>	<b>\$4,564,530</b>	
34	<i>PER MEAL COST, HSA-DAAS</i>	<i>\$6.69</i>	<i>\$6.69</i>	<i>\$6.69</i>	<i>\$6.69</i>	
35	<i>Per MEAL &amp; COMPLIANCE COST</i>	<i>\$6.80</i>	<i>\$6.80</i>	<i>\$6.80</i>	<i>\$6.80</i>	
36	<b>Non-DAAS Revenues</b>					
37	Project Income	352,126	352,126	352,126	\$1,056,379	\$1.57
38	Agency Cash - Fundraising	\$644,803	\$644,803	\$644,803	\$1,934,408	\$2.88
39	Agency In-Kind Volunteer	\$364,287	\$364,287	\$364,287	\$1,092,861	\$1.63
40	Nutrition Compliance Revenues					
41						
42	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$1,361,216</b>	<b>\$1,361,216</b>	<b>\$1,361,216</b>	<b>\$4,083,648</b>	
43	<i>PER MEAL COST, NON HSA-DAAS</i>	<i>\$6.08</i>	<i>\$6.08</i>	<i>\$6.08</i>	<i>\$6.08</i>	
44	<b>TOTAL REVENUES</b>	<b>\$2,882,726</b>	<b>\$2,882,726</b>	<b>\$2,882,726</b>	<b>\$8,648,178</b>	
45	<b>PER MEAL COST, TOTAL</b>	<b>\$12.87</b>	<b>\$12.87</b>	<b>\$12.87</b>	<b>\$12.87</b>	
46	Full Time Equivalent (FTE)					
48	Prepared by: Leny Nair	Phone No.: 415-677-7682	Date: 5/10/17			
49	HSA-CO Review Signature: _____				Date: _____	
50	HSA #1	Form Rev. 12/22/16				

	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: SELF-HELP FOR THE ELDERLY								Appendix B, page 2	
2	Program Name:								Date:	
3	CONG-ENP								5/10/17	
4										
5										
6										
7										
8	<b>H.S.A-DAAS</b>								<b>TOTAL</b>	
		Agency Totals		For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
10										
11	Office Manager/AT	\$51,500	100%	50%	50%	\$25,750	\$25,750	\$25,750	\$77,250	
12	Center Supervisor,LM	\$36,400	100%	50%	50%	\$18,200	\$18,200	\$18,200	\$54,600	
13	Center Coordinator/CC-GM	\$29,994	100%	25%	25%	\$7,499	\$7,499	\$7,499	\$22,496	
14	Center Coordinator/JL-SS	\$32,136	75%	50%	38%	\$12,051	\$12,051	\$12,051	\$36,153	
15	Center Coordinator/SW-LS	\$32,677	50%	50%	25%	\$8,169	\$8,169	\$8,169	\$24,508	
16	Center Coordinator/AK-MH	\$29,994	63%	25%	16%	\$4,687	\$4,687	\$4,687	\$14,060	
17	Center Coordinator/SI-JC	\$33,280	100%	50%	50%	\$16,640	\$16,640	\$16,640	\$49,920	
18	Center Coordinator/TBH-WH	\$29,640	63%	50%	31%	\$9,263	\$9,263	\$9,263	\$27,788	
19	Center Coordinator/JC-MT	\$29,994	75%	50%	38%	\$11,248	\$11,248	\$11,248	\$33,743	
20	Center Coordinator/JK-VV	\$30,160	63%	50%	31%	\$9,425	\$9,425	\$9,425	\$28,275	
21	Center Coordinator/TBH-D1	\$29,640	75%	100%	75%	\$22,230	\$22,230	\$22,230	\$66,690	
22	Mealsite Worker/WW-LS	\$29,120	63%	100%	63%	\$18,200	\$18,200	\$18,200	\$54,600	
23	Mealsite Worker/KI-JC	\$29,120	100%	90%	90%	\$26,208	\$26,208	\$26,208	\$78,624	
24	Mealsite Worker/YL-MT	\$29,120	63%	100%	63%	\$18,200	\$18,200	\$18,200	\$54,600	
25	Mealsite Worker/PW-WH	\$29,120	50%	50%	25%	\$7,280	\$7,280	\$7,280	\$21,840	
26	Mealsite Worker/LZ-SS	\$29,120	50%	100%	50%	\$14,560	\$14,560	\$14,560	\$43,680	
27	Mealsite Worker/TBH-GM	\$29,120	100%	100%	100%	\$29,120	\$29,120	\$29,120	\$87,360	
28	Mealsite Worker/TBH-MH	\$29,120	63%	100%	63%	\$18,200	\$18,200	\$18,200	\$54,600	
29	Mealsite Worker/CX-WP	\$29,120	63%	100%	63%	\$18,200	\$18,200	\$18,200	\$54,600	
30	Mealsite Worker/CS-VV	\$29,120	75%	100%	75%	\$21,840	\$21,840	\$21,840	\$65,520	
31	Mealsite Worker/TBH-D1	\$29,120	63%	100%	63%	\$18,200	\$18,200	\$18,200	\$54,600	
32	HDM Driver/LP	\$31,720	50%	25%	13%	\$3,965	\$3,965	\$3,965	\$11,895	
33	HDM Driver/KL	\$31,720	50%	25%	13%	\$3,965	\$3,965	\$3,965	\$11,895	
34	HDM Driver/AH	\$30,160	88%	25%	22%	\$6,598	\$6,598	\$6,598	\$19,793	
35	HDM Driver/XZ	\$29,120	100%	25%	25%	\$7,280	\$7,280	\$7,280	\$21,840	
36	HDM Driver/GJ	\$30,160	25%	25%	6%	\$1,885	\$1,885	\$1,885	\$5,655	
37	HDM Driver/YW	\$30,160	66%	25%	17%	\$4,976	\$4,976	\$4,976	\$14,929	
38	HDM Driver/TBH	\$30,160	50%	25%	13%	\$3,770	\$3,770	\$3,770	\$11,310	
39	HDM Worker/LY	\$29,120	50%	25%	13%	\$3,640	\$3,640	\$3,640	\$10,920	
40	HDM Worker/MW	\$29,120	50%	25%	13%	\$3,640	\$3,640	\$3,640	\$10,920	
41	HDM Worker/YL	\$29,120	50%	25%	13%	\$3,640	\$3,640	\$3,640	\$10,920	
42	HDM Worker/ZX	\$29,120	50%	25%	13%	\$3,640	\$3,640	\$3,640	\$10,920	
43	HDM Worker/QL	\$29,120	50%	25%	13%	\$3,640	\$3,640	\$3,640	\$10,920	
44	HDM Worker/FK	\$29,120	50%	25%	13%	\$3,640	\$3,640	\$3,640	\$10,920	
45	HDM Worker/LX	\$29,120	50%	25%	13%	\$3,640	\$3,640	\$3,640	\$10,920	
46	Program Assistant/LC	\$34,840	100%	30%	30%	\$10,452	\$10,452	\$10,452	\$31,356	
47	Program Assistant/EL	\$32,760	100%	36%	36%	\$11,794	\$11,794	\$11,794	\$35,381	
48	Program Assistant/ML	\$32,760	100%	12%	12%	\$3,931	\$3,931	\$3,931	\$11,794	
49	Program Assistant/VC	\$32,240	75%	50%	38%	\$12,090	\$12,090	\$12,090	\$36,270	
50										
51										
52	TOTALS	\$ 1,206,254	2704%	1968%	1391%	\$431,354	\$431,354	\$431,354	\$1,294,062	
53										
54	FRINGE BENEFIT RATE	30.0%								
55	EMPLOYEE FRINGE BENEFITS	\$ 361,876				\$129,406	\$129,406	\$129,406	\$388,218	
56										
57										
58	TOTAL DAAS SALARIES & BENEFITS	\$ 1,568,130				\$560,760	\$560,760	\$560,760	\$1,682,280	
59										

	A	B	C	D	E	F	G	H	I	J
61	<b>Non - DAAS</b>	Agency Totals		For DAAS Meal						TOTAL
62	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	Budgeted Salary
63	Meal Site Workers/LJ	\$ 29,120	75%	25%	19%		\$5,460	\$5,460	\$5,460	\$16,380
64	Meal Site Workers/ZY	\$ 29,120	75%	25%	19%		\$5,460	\$5,460	\$5,460	\$16,380
65	Meal Site Workers/LD	\$ 29,120	25%	25%	6%		\$1,820	\$1,820	\$1,820	\$5,460
66	Meal Site Workers/LJ	\$ 29,120	25%	25%	6%		\$1,820	\$1,820	\$1,820	\$5,460
67	Mealsite Worker/WW-LS	\$29,120	63%	50%	31%		\$9,100	\$9,100	\$9,100	\$27,300
68	Center Coordinator/CP	\$ 29,120	75%	100%	75%		\$21,840	\$21,840	\$21,840	\$65,520
69	Center Coordinator/CC-GM	\$29,994	100%	25%	25%		\$7,499	\$7,499	\$7,499	\$22,496
70	Center Coordinator/SW-LS	\$32,677	50%	50%	25%		\$8,169	\$8,169	\$8,169	\$24,508
71	Center Coordinator/AK-MH	\$29,994	63%	25%	16%		\$4,687	\$4,687	\$4,687	\$14,060
72	Center Coordinator/JK-VV	\$30,160	63%	50%	31%		\$9,425	\$9,425	\$9,425	\$28,275
73	Nutrition Director/KC	\$82,400	100%	23%	23%		\$18,952	\$18,952	\$18,952	\$56,856
74										
75										
76										
77										
78										
79										
80	<b>TOTAL NON-DAAS</b>	\$ 379,944	713%	423%	276%		\$94,231	\$94,231	\$94,231	\$282,694
81										
82	FRINGE BENEFIT RATE	38.0%								
83	EMPLOYEE FRINGE BENEFITS	\$ 144,379					\$35,808	\$35,808	\$35,808	\$107,424
84										
85										
86	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 524,323					\$130,039	\$130,039	\$130,039	\$390,117
87										
88	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 2,092,453					\$690,799	\$690,799	\$690,799	\$2,072,397
89	HSA #2									

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	A	B	C	D	E	F	G	H
1	Grantee's Name: SELF-HELP FOF							Appendix B, page 3
2	Program Name:							Date: 5/10/17
3	CONG-ENP							
4	<b>Operating Expense Detail</b>							
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	223,913	223,913	223,913	<b>TOTAL</b>		
8	<u>Expenditure Category</u>	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property							
10	Utilities(Elec, Water, Gas, Phone, Scavenger)							
11	Office Supplies, Postage							
12	Building Maintenance Supplies and Repair							
13	FOOD COSTS							
14	Raw Food	<i>per meal</i>						
15	Cong Food Svc Supplies	<i>per meal</i>						
16	HDM Food Svc Supplies	<i>per meal</i>						
17	Catered Meals	<i>per meal</i> \$ 3.56	\$797,966	\$797,966	\$797,966	\$2,393,898		
18	CONSULTANT/SUBCONTRACTOR Descriptive Title							
19	Registered Dietitian							
20								
21	OTHER COSTS:							
22	Insurance		\$3,069	\$3,069	\$3,069	\$9,207		
23	Staff Training & Travel							
24	Rental of Equipment							
25	Small equipment & Supplies							
26	Auto - Fuel & Insurance							
27	Repair/Maintenance							
28								
29								
30	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$801,035</b>	<b>\$801,035</b>	<b>\$801,035</b>	<b>\$2,403,105</b>		
32	<b>Non-DAAS</b>							<b>TOTAL</b>
33	<u>Expenditure Category</u>							
34	Rental of Property		\$78,494	\$78,494	\$78,494	\$235,482		
35	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$ 35,000	\$ 35,000	\$ 35,000	\$105,000		
36	Office Supplies, Postage		\$2,700	\$2,700	\$2,700	\$8,100		
37	Building Maintenance Supplies and Repair		\$27,000	\$27,000	\$27,000	\$81,000		
38	FOOD COSTS							
39	Raw Food	<i>per meal</i> \$ 0.10	\$22,391	\$22,391	\$22,391	\$67,174		
40	Cong Food Svc Supplies	<i>per meal</i> \$ 0.20	\$44,783	\$44,783	\$44,783	\$134,348		
41	HDM Food Svc Supplies	<i>per meal</i>						
42	Catered Meals	<i>per meal</i> \$ 0.42	\$93,207	\$93,207	\$93,207	\$279,622		
43	CONSULTANT/SUBCONTRACTOR Descriptive Title							
44	Registered Dietitian							
45								
46	OTHER COSTS:							
47	Insurance		\$5,688	\$5,688	\$5,688	\$17,064		
48	Staff Training & Travel		\$700	\$700	\$700	\$2,100		
49	Communications (Phone & Internet)		\$19,196	\$19,196	\$19,196	\$57,588		
50	Rental of Equipment		\$3,245	\$3,245	\$3,245	\$9,735		
51	Small equipment & Supplies		\$500	\$500	\$500	\$1,500		
52	Auto - Fuel & Insurance		\$19,000	\$19,000	\$19,000	\$57,000		
53	Repair/Maintenance-Vehicle		\$1,000	\$1,000	\$1,000	\$3,000		
54	Membership dues/subscription		\$610	\$610	\$610	\$1,830		
55	Bank Charges		\$1,500	\$1,500	\$1,500	\$4,500		
56	Recruitment		\$2,000	\$2,000	\$2,000	\$6,000		
58	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$357,014</b>	<b>\$357,014</b>	<b>\$357,014</b>	<b>\$1,071,043</b>		
59								
60	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$1,158,049</b>	<b>\$1,158,049</b>	<b>\$1,158,049</b>	<b>\$3,474,148</b>		



	A	B	C	D	E	F
1	<b>BUDGET FORMS</b>					Appendix B1, pg. 1
2	Document Date:					5/9/2017
3	<b>HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES</b>					
4	<b>BUDGET PROPOSAL FORMS</b>					
5	Grantee's Name: SELF-HELP FOR THE ELDERLY				Grant Term	
6	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
7	Effective Date of Mod:		No. of Mod:		7/1/17 to 6/30/20	
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-AWD, or HDM-AWD)	<b>CHAMPSS</b>	<b>CHAMPSS</b>	<b>CHAMPSS</b>	<b>TOTAL</b>	Average cost/meal
9	<b>Annual #Meals Contracted</b>	59,420	59,420	59,420	178,260	
10	Program Term	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
11	<b>DAAS Expenditures</b>					
12	Salaries & Benefits	\$157,273	\$157,273	\$157,273	\$471,819	\$2.65
13	Operating Expense	\$289,453	\$289,453	\$289,453	\$868,359	\$4.87
14	<b>Subtotal</b>	<b>\$446,726</b>	<b>\$446,726</b>	<b>\$446,726</b>	<b>\$1,340,178</b>	<b>\$7.52</b>
15	Indirect Percentage (max 10%)	10%	10%	10%	10%	
16	Indirect Cost (Line 15 X Line 14, check Gen.Guidance regarding indirect exclusion)	\$44,673	\$44,673	\$44,673	\$134,019	\$0.75
17	Capital Expenditure					
18	<b>TOTAL DAAS EXPENDITURES</b>	<b>\$491,399</b>	<b>\$491,399</b>	<b>\$491,399</b>	<b>\$1,474,197</b>	<b>\$8.27</b>
19						
20	<b>Non-DAAS Expenditures</b>					
21	Salaries & Benefits					
22	Operating Expense	\$180,000	\$180,000	\$180,000	\$540,000	\$3.03
23	Capital Expenditure					
24	<b>TOTAL Non-DAAS EXPENDITURES</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$540,000</b>	<b>\$3.03</b>
25						
26	<b>TOTAL DAAS &amp; Non-DAAS EXPENDITURES</b>	<b>\$671,399</b>	<b>\$671,399</b>	<b>\$671,399</b>	<b>\$2,014,197</b>	<b>\$11.30</b>
27						
28	<b>HSA-DAAS Revenues</b>					
29	Meals	\$491,399	\$491,399	\$491,399	\$1,474,196	
30	Nutrition Compliance (if your agency is requesting funds)					
31						
32						
33						
34	<b>TOTAL HSA-DAAS REVENUES</b>	<b>\$491,399</b>	<b>\$491,399</b>	<b>\$491,399</b>	<b>\$1,474,196</b>	
35	<b>PER MEAL COST, HSA-DAAS</b>	<b>\$8.27</b>	<b>\$8.27</b>	<b>\$8.27</b>	<b>\$8.27</b>	
36	<b>Per MEAL &amp; COMPLIANCE COST</b>	<b>\$8.27</b>	<b>\$8.27</b>	<b>\$8.27</b>	<b>\$8.27</b>	
37	<b>Non-DAAS Revenues</b>					
38	Project Income	180,000	180,000	180,000	\$540,000	\$3.03
39	Agency Cash - Fundraising	\$0	\$0	\$0	(\$0)	\$0.00
40	Agency In-Kind Volunteer					
41	Nutrition Compliance Revenues					
42						
43	<b>TOTAL NON HSA-DAAS REVENUES</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$540,000</b>	
44	<b>PER MEAL COST, NON HSA-DAAS</b>	<b>\$3.03</b>	<b>\$3.03</b>	<b>\$3.03</b>	<b>\$3.03</b>	
45	<b>TOTAL REVENUES</b>	<b>\$671,399</b>	<b>\$671,399</b>	<b>\$671,399</b>	<b>\$2,014,196</b>	
46	<b>PER MEAL COST, TOTAL</b>	<b>\$11.30</b>	<b>\$11.30</b>	<b>\$11.30</b>	<b>\$11.30</b>	
47	Full Time Equivalent (FTE)					
49	Prepared by: Leny Nair	Phone No.: 415-677-7682		Date: 5/9/17		
50	HSA-CO Review Signature:				Date: _____	
51	HSA #1	Form Rev. 12/22/16				

	A	B	C	D	E	F	G	H	I	J
1	Grantee's Name: SELF-HELP FOR THE ELDERLY								Appendix B1, page 2	
2	Program Name: CHAMPSS								Date: 5/9/17	
3	CHAMPSS									
4										
5	<b>Salaries &amp; Benefits Detail</b>								<b>TOTAL</b>	
6										
7										
8	<b>H.S.A-DAAS</b>	Agency Totals		For DAAS Nutrition		7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20	
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
10	Director-Nutrition/KC	\$82,400	100%	16%	16%	\$13,184	\$13,184	\$13,184	\$39,552	
11	Assistant Director/RC	\$67,000	100%	21%	21%	\$14,070	\$14,070	\$14,070	\$42,210	
12	Office Manager/AT	\$51,500	100%	37%	37%	\$19,055	\$19,055	\$19,055	\$57,165	
13	CHAMPSS Coordinator/SZ	\$39,520	100%	100%	100%	\$39,520	\$39,520	\$39,520	\$118,560	
14	CHAMPSS Admin Asst/JH	\$32,760	100%	100%	100%	\$32,760	\$32,760	\$32,760	\$98,280	
15										
16										
17										
18	<b>TOTALS</b>	\$ 273,180	500%	274%	274%	\$118,589	\$118,589	\$118,589	\$355,767	
19										
20	FRINGE BENEFIT RATE	32.6%								
21	EMPLOYEE FRINGE BENEFITS	\$ 89,111				\$38,684	\$38,684	\$38,684	\$116,052	
22										
23										
24	<b>TOTAL DAAS SALARIES &amp; BENEFITS</b>	\$ 362,291				\$157,273	\$157,273	\$157,273	\$471,819	
25										
26										
27	<b>Non - DAAS</b>	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	
29	Meal site & kitchen volunteers									
30										
31										
32										
33										
34										
35										
36										
37										
38										
39										
40										
41										
42										
43										
44										
45										
46	<b>TOTAL NON-DAAS</b>	\$ -								
47										
48	FRINGE BENEFIT RATE									
49	EMPLOYEE FRINGE BENEFITS	\$ -								
50										
51										
52	<b>TOTAL Non-DAAS SALARIES &amp; BENEFITS</b>	\$ -								
53										
54	<b>TOTAL DAAS &amp; Non-DAAS SALARIES &amp; BENEFITS</b>	\$ 362,291				\$157,273	\$157,273	\$157,273	\$471,819	
55	<b>HSA #2</b>									

	A	B	C	D	E	F	G	H
1	Grantee's Name: SELF-HELP FOF							Appendix B1, page
2	Program Name:							Date: 5/9/17
3	<b>CHAMPSS</b>							
4	<b>Operating Expense Detail</b>							
5								
7	<b>H.S.A-DAAS</b>	Annual #Meals Contracted:	59,420	59,420	59,420	<b>TOTAL</b>		
8	<u>Expenditure Category</u>	Term:	7/1/17 to 6/30/18	7/1/18 to 6/30/19	7/1/19 to 6/30/20	7/1/17 to 6/30/20		
9	Rental of Property							
10	Utilities(Elec, Water, Gas, Phone, Scavenger)							
11	Office Supplies, Postage		\$78	\$78	\$78	\$234		
12	Building Maintenance Supplies and Repair							
13	<b>FOOD COSTS</b>							
14	Raw Food	per meal \$	-					
15	Cong Food Svc Supplies	per meal						
16	HDM Food Svc Supplies	per meal \$	-					
17	Catered Meals	per meal \$	4.87	\$289,375	\$289,375	\$289,375	\$868,125	
18	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
19	Registered Dietitian							
20								
21	<b>OTHER COSTS:</b>							
22	Insurance							
23	Staff Training & Travel							
24	Rental of Equipment							
25	Small equipment & Supplies							
26	Auto - Fuel & Insurance							
27	Repair/Maintenance							
28								
29								
30	<b>TOTAL DAAS OPERATING EXPENSE</b>		<b>\$289,453</b>	<b>\$289,453</b>	<b>\$289,453</b>	<b>\$868,359</b>		
32	<b>Non-DAAS</b>							<b>TOTAL</b>
33	<u>Expenditure Category</u>							
34	Rental of Property		\$7,000	\$7,000	\$7,000	\$21,000		
35	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$ 500.00	\$ 500.00	\$500	\$1,500		
36	Office Supplies, Postage		\$475	\$475	\$475	\$1,425		
37	Building Maintenance Supplies and Repair							
38	<b>FOOD COSTS</b>							
39	Raw Food	per meal						
40	Cong Food Svc Supplies	per meal						
41	HDM Food Svc Supplies	per meal \$	-					
42	Catered Meals	per meal \$	2.63	\$156,275	\$156,275	\$156,275	\$468,824	
43	<b>CONSULTANT/SUBCONTRACTOR Descriptive Title</b>							
44	Registered Dietitian							
45								
46	<b>OTHER COSTS:</b>							
47	Insurance		\$3,000	\$3,000	\$3,000	\$9,000		
48	Staff Training & Travel		\$2,000	\$2,000	\$2,000	\$6,000		
49	Printing		\$500	\$500	\$500	\$1,500		
50	Rental of Equipment							
51	Small equipment & Supplies		\$750	\$750	\$750	\$2,251		
52	Auto - Fuel & Insurance							
53	Bank Charges		\$2,500	\$2,500	\$2,500	\$7,500		
54	Software/Database		\$7,000	\$7,000	\$7,000	\$21,000		
56	<b>TOTAL Non-DAAS OPERATING EXPENSE</b>		<b>\$180,000</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$516,075</b>		
57								
58	<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>		<b>\$469,453</b>	<b>\$469,453</b>	<b>\$469,453</b>	<b>\$1,384,434</b>		
63	<b>HSA #3</b>	Form Rev. 12/22/16						



**HUMAN SERVICES AGENCY BUDGET SUMMARY  
 BY PROGRAM**

5 Contractor Name: **Self-Help for the Elderly** Term: **July 1, 2017 to June 30, 2020**

7 (Check One) New  Renewal  Modification

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

9	Program: Nutrition Compliance for ENP- Congregate	REVENUE Cost Allocation:			REVENUE Cost Allocation:			REVENUE Cost Allocation:			Total Revenue
		Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Year 2	H.S.A.-DAAS	Non-HSA-DAAS	Year 3	H.S.A.-DAAS	Non-HSA-DAAS	
10	Budget Reference Page No.(s)										
11	Program Term	7/1/17-6/30/18			7/1/18-6/30/19			7/1/19-6/30/20			7/1/17 to 6/30/20
12	<b>Expenditures</b>										
13	<b>Nutrition Education</b>										
14	Salaries & Benefits	\$1,250	\$1,222	\$28	\$1,250	\$1,222	\$28	\$1,250	\$1,222	\$28	\$3,750
15	Operating Expense										
16	Subtotal Direct	\$1,250	\$1,222	\$28	\$1,250	\$1,222	\$28	\$1,250	\$1,222	\$28	\$3,750
17	Indirect Percentage	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	
18	Indirect Expense	\$125	\$122	\$1	\$125	\$122	\$1	\$125	\$122	\$1	
19	<b>Total Nutrition Education</b>	<b>\$1,375</b>	<b>\$1,344</b>	<b>\$29</b>	<b>\$1,375</b>	<b>\$1,344</b>	<b>\$29</b>	<b>\$1,375</b>	<b>\$1,344</b>	<b>\$29</b>	<b>\$3,750</b>
20	<b>Nutrition Counseling</b>										
21	Salaries & Benefits										
22	Operating Expense										
23	Subtotal Direct										
24	Indirect Percentage										
25	Indirect Expense										
26	<b>Total Nutrition Counseling</b>										
27	<b>HACCP Kitchen Monitoring</b>										
28	Salaries & Benefits	\$3,226	\$3,217	\$9	\$3,226	\$3,217	\$9	\$3,226	\$3,217	\$9	\$9,678
29	Operating Expense	\$52	\$52		\$52	\$52		\$52	\$52		\$156
30	Subtotal Direct	\$3,278	\$3,269	\$9	\$3,278	\$3,269	\$9	\$3,278	\$3,269	\$9	\$9,834
31	Indirect Percentage	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	
32	Indirect Expense	\$328	\$327	\$0	\$328	\$327	\$0	\$328	\$327	\$0	\$983
33	<b>Total HACCP Kitchen Monitoring</b>	<b>\$3,606</b>	<b>\$3,596</b>	<b>\$10</b>	<b>\$3,606</b>	<b>\$3,596</b>	<b>\$10</b>	<b>\$3,606</b>	<b>\$3,596</b>	<b>\$10</b>	<b>\$10,817</b>
34	<b>Site/Route Monitoring</b>										
35	Salaries & Benefits	\$12,918	\$12,731	\$188	\$12,918	\$12,731	\$188	\$12,918	\$12,731	\$188	\$38,754
36	Operating Expense										
37	Subtotal Direct	\$12,918	\$12,731	\$188	\$12,918	\$12,731	\$188	\$12,918	\$12,731	\$188	\$38,754
38	Indirect Percentage	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	
39	Indirect Expense	\$1,292	\$1,273	\$4	\$1,292	\$1,273	\$4	\$1,292	\$1,273	\$4	\$3,876
40	<b>Total Site/Route Monitoring</b>	<b>\$14,210</b>	<b>\$14,004</b>	<b>\$191</b>	<b>\$14,210</b>	<b>\$14,004</b>	<b>\$191</b>	<b>\$14,210</b>	<b>\$14,004</b>	<b>\$191</b>	<b>\$42,630</b>
41	<b>Menu Planning</b>										
42	Salaries & Benefits	\$2,715	\$2,545	\$170	\$2,715	\$2,545	\$170	\$2,715	\$2,545	\$170	\$8,145
43	Operating Expense										
44	Subtotal Direct	\$2,715	\$2,545	\$170	\$2,715	\$2,545	\$170	\$2,715	\$2,545	\$170	\$8,145
45	Indirect Percentage	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	
46	Indirect Expense	\$272	\$254	\$3	\$272	\$254	\$3	\$272	\$254	\$3	\$816
47	<b>Total Menu Planning</b>	<b>\$2,987</b>	<b>\$2,799</b>	<b>\$174</b>	<b>\$2,987</b>	<b>\$2,799</b>	<b>\$174</b>	<b>\$2,987</b>	<b>\$2,799</b>	<b>\$174</b>	<b>\$8,961</b>
48	<b>HDM Assessments</b>										
49	Salaries & Benefits										
50	Operating Expense										
51	Subtotal Direct										
52	Indirect Percentage										
53	Indirect Expense										
54	<b>Total HDM Assessments</b>										
55	<b>Other Nutrition Compliance</b>										
56	Salaries & Benefits	\$1,695	\$1,629	\$66	\$1,695	\$1,629	\$66	\$1,695	\$1,629	\$66	\$5,085
57	Operating Expense										
58	Subtotal Direct	\$1,695	\$1,629	\$66	\$1,695	\$1,629	\$66	\$1,695	\$1,629	\$66	\$5,085
59	Indirect Percentage	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	10.0%	10.0%	2.0%	
60	Indirect Expense	\$170	\$163	\$1	\$170	\$163	\$1	\$170	\$163	\$1	\$510
61	<b>Total Other Nutrition Compliance</b>	<b>\$1,865</b>	<b>\$1,792</b>	<b>\$67</b>	<b>\$1,865</b>	<b>\$1,792</b>	<b>\$67</b>	<b>\$1,865</b>	<b>\$1,792</b>	<b>\$67</b>	<b>\$5,595</b>
62	<b>GRAND Total Expenditures</b>	<b>\$24,042</b>	<b>\$23,535</b>	<b>\$471</b>	<b>\$24,042</b>	<b>\$23,535</b>	<b>\$471</b>	<b>\$24,042</b>	<b>\$23,535</b>	<b>\$471</b>	<b>\$71,753</b>
63	<b>HSA Revenues</b>										
64											
65											
66	<b>TOTAL HSA REVENUES</b>										
67	<b>Other Non-H.S.A.-DAAS Revenues</b>										
68											
69											
70											
71	<b>TOTAL OTHER REVENUES</b>										
72	Full Time Equivalent (FTE)	???									

74 Prepared by: Kelly Chew Telephone No.: 415-677-7606 Date 2/14/2017

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

76 HSA #1 \_\_\_\_\_ Document Date: 2/14/17

Nutrition Education Salaries & Benefits Detail

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
2															
3	Program: Nutrition Compliance for ENP- Congregate														
4	(Same as Line 9 on HSA #1)														
5															
6															
7															
8	TERM:														
9	July 1, 2017 to June 30, 2020														
10															
11															
12															
13	Assistant Director/RC	\$59,740	100%	2%	2%	\$926	\$905	\$21	\$926	\$905	\$21	\$926	\$905	\$21	\$2,778
14															
15															
16															
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21															
22															
23															
24															
25															
26															
27															
28															
29															
30	TOTALS	\$59,740	100%	2%	2%	\$926	\$905	\$21	\$926	\$905	\$21	\$926	\$905	\$21	\$2,778
31															
32	FRINGE BENEFIT RATE														
33	EMPLOYEE FRINGE BENEFITS	\$20,909				\$324	\$317	\$7	\$324	\$317	\$7	\$324	\$317	\$7	\$972
34															
35															
36	TOTAL SALARIES & BENEFITS	\$80,649				\$1,250	\$1,222	\$28	\$1,250	\$1,222	\$28	\$1,250	\$1,222	\$28	\$3,750
37	TOTAL SALARIES & BENEFITS for H.S.A Program x3yrs	\$3,750													
38	HSA #2														

HACCP Kitchen Monitoring Salaries & Benefits Detail

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
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42															
43															
44															

HACCP Kitchen Monitoring Operating Expense Detail

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1																					
2																					
3																					
4																					
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Document Date: 2/14/17

Site or Route Monitoring Salaries & Benefits Detail

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
2															
3															
4	Program: Nutrition Compliance for ENP - Congregate														
5	(Same as Line 9 on HSA #1)														
6															
7															
8	TERM: July 1, 2017 to June 30, 2020														
9															
10															
11															
12															
13	Assistant Director/RC	\$59,740	100%	11%	11%	\$6,273	H.S.A.-DAAS \$6,230	Non-HSA-DAAS \$43	Budgeted Salary \$6,273	H.S.A.-DAAS \$6,230	Non-HSA-DAAS \$43	Budgeted Salary \$6,273	H.S.A.-DAAS \$6,230	Non-HSA-DAAS \$43	\$18,819
14	Director - KC	\$82,400	100%	4%	4%	\$3,296	H.S.A.-DAAS \$3,200	Non-HSA-DAAS \$96	Budgeted Salary \$3,296	H.S.A.-DAAS \$3,200	Non-HSA-DAAS \$96	Budgeted Salary \$3,296	H.S.A.-DAAS \$3,200	Non-HSA-DAAS \$96	\$9,888
15															
16															
17															
18															
19															
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21															
22															
23															
24															
25															
26															
27															
28															
29															
30	TOTALS	\$142,140	200%	15%	15%	\$9,569	\$9,430	\$139	\$9,569	\$9,430	\$139	\$9,569	\$9,430	\$139	\$28,707
31															
32	FRINGE BENEFIT RATE	35%													
33	EMPLOYEE FRINGE BENEFITS	\$49,749				\$3,349	\$3,301	\$49	\$3,349	\$3,301	\$49	\$3,349	\$3,301	\$49	\$10,047
34															
35															
36	TOTAL SALARIES & BENEFITS	\$191,889				\$12,918	\$12,731	\$188	\$12,918	\$12,731	\$188	\$12,918	\$12,731	\$188	\$38,754
37	TOTAL SALARIES & BENEFITS for HAS Program x3yrs	\$38,753													
38	HSA #8														

Document Date: 2/14/17

Menu Planning Salaries & Benefits Detail

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
2															
3															
4	Program: Nutrition Compliance for ENP- Congregate														
5	(Same as Line 9 on HSA #1)														
6															
7															
8	TERM														
9	July 1, 2017 to June 30, 2020														
10															
11															
12															
13	Assistant Director/RC	\$59,740	100%	2%	2%	\$1,075	\$1,075		\$1,075	\$1,075		\$1,075	\$1,075		\$3,225
14	Registered Dietitian - RC	\$62,400	100%	2%	2%	\$936	\$810	\$126	\$936	\$810	\$126	\$936	\$810	\$126	\$2,808
15															
16															
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25															
26															
27															
28															
29															
30	TOTALS	\$122,140	200%	3%	3%	\$2,011	\$1,885	\$126	\$2,011	\$1,885	\$126	\$2,011	\$1,885	\$126	\$6,033
31															
32	FRINGE BENEFIT RATE	35%													
33	EMPLOYEE FRINGE BENEFITS	\$42,749				\$704	\$660	\$44	\$704	\$660	\$44	\$704	\$660	\$44	\$2,112
34															
35															
36	TOTAL SALARIES & BENEFITS	\$164,889				\$2,715	\$2,545	\$170	\$2,715	\$2,545	\$170	\$2,715	\$2,545	\$170	\$8,145
37	TOTAL SALARIES & BENEFITS for H.S.A Program x3yrs	\$8,146													
38	HSA #10														

Document Date:



Other Nutrition Compliance Salaries & Benefits Detail

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
2															
3															
4	Program: Nutrition Compliance for ENP - Congregate														
5	(Same as Line 9 on HSA #1)														
6															
7															
8	TERM														
9	July 1, 2017 to June 30, 2020														
10															
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Document Date: 2/14/17