



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director

MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: MELISSA MCGEE, ACTING DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

DATE: JUNE 22, 2016

SUBJECT: **GRANT/CONTRACT RENEWALS: MULTIPLE GRANTEES/CONTRACTORS (see table below) for NUTRITION SERVICES for SENIORS AND ADULTS WITH DISABILITIES**

GRANT/CONTRACT TERM:	<u>Original Term</u> 7/1/13-6/30/16	<u>Renewal Term</u> 7/1/16-6/30/17			
GRANT/CONTRACT AMOUNT:	<u>Current</u> \$36,238,424	<u>Renewal</u> \$13,548,643	<u>Contingency</u> \$1,354,864	<u>Total</u> \$14,903,507	
ANNUAL AMOUNT:	<u>FY 16/17</u> \$13,548,643				
FUNDING SOURCE MOD FUNDING: PERCENTAGE:	<u>County</u> \$9,847,915 72%	<u>State</u> \$409,362 3%	<u>Federal</u> \$3,291,366 25%	<u>Contingency</u> \$1,354,864	<u>Total</u> \$14,903,507 100%

The Department of Aging and Adult Services requests authorization to renew various grant/contract agreements with multiple providers for the provision of nutrition services to seniors and adults with disabilities (AWD) for the period of July 1, 2016 to June 30, 2017. The total of the new grant/contract amounts plus a 10% contingency will not exceed \$14,903,507, and are detailed in the table below (on pages 3-4).

Background

Adequate nutrition is critical to the health, functioning, and increased quality of life for San Francisco's aging population. The Elderly Nutrition Program (ENP), authorized through Title III, under the Older Americans Act, is intended to improve the dietary intake of participants and to

offer participants opportunities to create informal support networks. The legislative intent is to make community-based services available to older adults who may be at risk of losing their independence. DAAS has provided ENP services since 1975. The ENP managed by the department is the largest elderly community nutrition services program in San Francisco.

With the conclusion of the original grant/contract terms which ran from July 2013 through June 2016, the Department intends to renew all of the agreements for a one-year period.

Services to be Provided

Grantees will continue to provide various types of hot meals at congregate meal sites strategically located in different neighborhoods, deliver hot, chilled and frozen meals to the homes of eligible individuals throughout the City, and provide nutrition compliance services to meet the Title III-C 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 at congregate meal sites scattered across the city. The meals providers collectively cover multiple cultural cuisines and serve food every weekday (weekends as well at a smaller number of sites). Congregate meal services not only afford optimal nutritional intake, but also provide a space for seniors to socialize and be active during the day. Per State-mandated requirements, DAAS meals providers must also receive regular kitchen monitorings, and offer a number of nutrition education sessions for the program participants each year. These services are obtained either by the provider itself, in-kind through partnership with City College of San Francisco's Adult Education Program, or through the independent nutritionist contractor Candice Tang.
- Congregate meals for adults with disabilities (AWD): Roughly half of the providers that serve congregate meals to seniors provide the same service to 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, and 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 included in their 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 the Institute on Aging.

- 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, Meals on Wheels is the sole provider of this particular service.

ENP Congregate Meals

Agency	Fiscal Year (FY) 13-16 Total Amount	FY 16-17 Amount	10% Contingency	FY 16-17 Not-To-Exceed Amount
Bayview Hunters Point Multi-Purpose Senior Services	\$1,156,713	\$404,687	\$40,469	\$445,156
Candice Tang	\$78,700	\$26,700	\$2,670	\$29,370
Centro Latino de San Francisco	\$898,824	\$305,242	\$30,524	\$335,766
Episcopal Community Services of San Francisco	\$549,091	\$175,522	\$17,552	\$193,074
Glide	\$428,671	\$153,803	\$15,380	\$169,183
Jewish Community Center of San Francisco	\$353,832	\$117,800	\$11,780	\$129,580
Kimochi, Inc.	\$1,300,629	\$433,247	\$43,325	\$476,572
On Lok Day Services	\$1,605,878	\$546,920	\$54,692	\$601,612
Project Open Hand	\$4,114,429	\$1,411,529	\$141,153	\$1,552,682
Russian American Community Services	\$612,705	\$229,491	\$22,949	\$252,440
Samoan Community Development Center	\$81,338	\$27,151	\$2,715	\$29,866
Self Help for the Elderly	\$4,137,395	\$1,401,521	\$140,152	\$1,541,673
Total	\$15,346,555	\$5,233,613	\$523,361	\$5,756,974

ENP Home-Delivered Meals

Centro Latino de San Francisco	\$493,465	\$171,114	\$17,111	\$188,225
Jewish Family and Children's Services	\$219,171	\$79,788	\$7,979	\$87,767
Kimochi, Inc.	\$736,914	\$251,777	\$25,178	\$276,955
Meals on Wheels	\$12,216,878	\$4,901,073	\$490,107	\$5,391,180
On Lok Day Services	\$1,683,474	\$593,903	\$59,390	\$653,293
Russian American Community Services	\$632,937	\$240,751	\$24,075	\$264,826
Self Help for the Elderly	\$1,406,779	\$513,336	\$51,334	\$564,670
Total	\$17,389,618	\$6,751,742	\$675,174	\$7,426,916

AWD Congregate Meals

Bayview Hunters Point Multi-Purpose Senior Services	\$212,538	\$85,235	\$8,524	\$93,759
Centro Latino de San Francisco	\$76,627	\$30,477	\$3,048	\$33,525

Agency	Fiscal Year (FY) 13-16 Total Amount	FY 16-17 Amount	10% Contingency	FY 16-17 Not- To-Exceed Amount
Episcopal Community Services of San Francisco	\$70,518	\$23,375	\$2,337	\$25,712
Project Open Hand	\$220,432	\$119,119	\$11,912	\$131,031
Russian American Community Services	\$17,939	\$5,297	\$530	\$5,827
Self Help for the Elderly	\$49,364	\$16,632	\$1,663	\$18,295
Total	\$647,418	\$280,135	\$28,014	\$308,149

AWD Home-Delivered Meals

Institute on Aging	\$396,854	\$175,266	\$17,527	\$192,793
Meals on Wheels	\$880,945	\$538,417	\$53,842	\$592,259
Russian American Community Services	\$541,671	\$186,924	\$18,692	\$205,616
Self Help for the Elderly	\$693,971	\$274,755	\$27,476	\$302,231
Total	\$2,513,441	\$1,175,362	\$117,536	\$1,292,898

Emergency Home-Delivered Meals

Meals on Wheels	\$341,392	\$107,791	\$10,779	\$118,570
Total	\$341,392	\$107,791	\$10,779	\$118,570

Grantee Performance

Standard fiscal and contract compliance monitorings were conducted on the grantees (not Candice Tang, who is a private individual contractor) between the months of December to April during the 15-16 fiscal year. The Department is satisfied that all of the grantees comply with City contracting requirements.

Program performance monitoring was conducted on these grantees between the months of January to May 2016, and the Department found all the grantees to have had satisfactory program performance over the past fiscal year.

Selection

Grantees were selected through RFP #535 issued in December 2012.

Funding

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

Attachments

- Appendix A – Services to be Provided – Bayview Hunters Point Multi-Purpose Senior Services (ENP Congregate Meals)
- Appendix B – Budget – Bayview Hunters Point Multi-Purpose Senior Services (ENP Congregate Meals)
- Appendix Ba – Budget – Bayview Hunters Point Multi-Purpose Senior Services (ENP Congregate Meals NCQA)
- Appendix A-1 – Services to be Provided – Bayview Hunters Point Multi-Purpose Senior Services (AWD Congregate Meals)
- Appendix B-1 – Budget – Bayview Hunters Point Multi-Purpose Senior Services (AWD Congregate Meals)
- Appendix A – Services to be Provided – Candice Tang (ENP Congregate and HDM Nutrition Compliance)
- Appendix B – Budget – Candice Tang (ENP Congregate and HDM Nutrition Compliance)
- Appendix A – Services to be Provided – Centro Latino de San Francisco (ENP Congregate Meals)
- Appendix B – Budget – Centro Latino de San Francisco (ENP Congregate Meals)
- Appendix B1 – Budget – Centro Latino de San Francisco (ENP Congregate Meals NCQA)
- Appendix A1 – Services to be Provided – Centro Latino de San Francisco (AWD Congregate Meals)
- Appendix B4 – Budget – Centro Latino de San Francisco (AWD Congregate Meals)
- Appendix A2 – Services to be Provided – Centro Latino de San Francisco (ENP Home-Delivered Meals)
- Appendix B2 – Budget – Centro Latino de San Francisco (ENP Home-Delivered Meals)
- Appendix B3 – Budget – Centro Latino de San Francisco (ENP Home-Delivered Meals NCQA)
- Appendix A – Services to be Provided – Episcopal Community Services (ENP Congregate Meals)
- Appendix B – Budget – Episcopal Community Services (ENP Congregate Meals)
- Appendix A – Services to be Provided – Episcopal Community Services (AWD Congregate Meals)
- Appendix B – Budget – Episcopal Community Services (AWD Congregate Meals)
- Appendix A – Services to be Provided – Glide Foundation (AWD Congregate Meals)
- Appendix B – Budget – Glide Foundation (ENP Congregate Meals)
- Appendix Ba – Budget – Glide Foundation (ENP Congregate Meals NCQA)
- Appendix A – Services to be Provided – Institute on Aging (AWD Home-Delivered Meals Assessments)
- Appendix B – Budget – Institute on Aging (AWD Home-Delivered Meals Assessments)
- Appendix A – Services to be Provided – Jewish Community Center of San Francisco (ENP Congregate Meals)
- Appendix B – Budget – Jewish Community Center of San Francisco (ENP Congregate Meals)
- Appendix A – Services to be Provided – Jewish Family and Children’s Services (ENP Home-Delivered Meals)
- Appendix B – Budget – Jewish Family and Children’s Services (ENP Home-Delivered Meals)

Appendix Ba – Budget – Jewish Family and Children’s Services (ENP Home-Delivered Meals NCQA)

Appendix A – Services to be Provided – Kimochi (ENP Congregate Meals)

Appendix B – Budget – Kimochi (ENP Congregate Meals)

Appendix Ba – Budget – Kimochi (ENP Congregate Meals NCQA)

Appendix A-1 – Services to be Provided – Kimochi (ENP Home-Delivered Meals)

Appendix B – Budget – Kimochi (ENP Home-Delivered Meals)

Appendix B-1a – Budget – Kimochi (ENP Home-Delivered Meals NCQA)

Appendix A – Services to be Provided – Meals on Wheels (ENP Home-Delivered Meals)

Appendix B – Budget – Meals on Wheels (ENP Home-Delivered Meals)

Appendix B1 – Budget – Meals on Wheels (ENP Home-Delivered Meals NCQA)

Appendix A2 – Services to be Provided – Meals on Wheels (Emergency Home-Delivered Meals)

Appendix B2 – Budget – Meals on Wheels (Emergency Home-Delivered Meals)

Appendix A1 – Services to be Provided – Meals on Wheels (AWD Home-Delivered Meals)

Appendix B3 – Budget – Meals on Wheels (AWD Home-Delivered Meals)

Appendix A – Services to be Provided – On Lok Day Services (ENP Congregate Meals)

Appendix B – Budget – On Lok Day Services (ENP Congregate Meals)

Appendix B1 – Budget – On Lok Day Services (ENP Congregate Meals NCQA)

Appendix A – Services to be Provided – On Lok Day Services (ENP Home-Delivered Meals)

Appendix B – Budget – On Lok Day Services (ENP Home-Delivered Meals)

Appendix B – Budget – On Lok Day Services (ENP Home-Delivered Meals NCQA)

Appendix A – Services to be Provided – Project Open Hand (ENP Congregate Meals)

Appendix B – Budget – Project Open Hand (ENP Congregate Meals)

Appendix Ba – Budget – Project Open Hand (ENP Congregate Meals NCQA)

Appendix B-1 – Budget – Project Open Hand (Breakfast Meals)

Appendix A-2 – Services to be Provided – Project Open Hand (AWD Congregate Meals)

Appendix B-2 – Budget – Project Open Hand (ENP Congregate Meals)

Appendix A – Services to be Provided – Russian American Community Services (ENP Congregate Meals)

Appendix B – Budget – Russian American Community Services (ENP Congregate Meals)

Appendix A2 – Services to be Provided – Russian American Community Services (ENP Home-Delivered Meals)

Appendix B2 – Budget – Russian American Community Services (ENP Home-Delivered Meals)

Appendix B2a – Budget – Russian American Community Services (ENP Home-Delivered Meals NCQA)

Appendix A3 – Services to be Provided – Russian American Community Services (AWD Congregate Meals)

Appendix B3 – Budget – Russian American Community Services (AWD Congregate Meals)

Appendix A4 – Services to be Provided – Russian American Community Services (AWD Home-Delivered Meals)

Appendix B4 – Budget – Russian American Community Services (AWD Home-Delivered Meals)

Appendix A – Services to be Provided – Samoan Community Development Center (ENP Congregate Meals)

- Appendix B – Budget – Samoan Community Development Center (ENP Congregate Meals)
- Appendix A – Services to be Provided – Self Help for the Elderly (ENP Congregate Meals)
- Appendix B – Budget – Self Help for the Elderly (ENP Congregate Meals)
- Appendix B1 – Budget – Self Help for the Elderly (ENP Congregate Meals NCQA)
- Appendix A1 – Services to be Provided – Self Help for the Elderly (ENP Home-Delivered Meals)
- Appendix B2 – Budget – Self Help for the Elderly (ENP Home-Delivered Meals)
- Appendix B3 – Budget – Self Help for the Elderly (ENP Home-Delivered Meals NCQA)
- Appendix A2 – Services to be Provided – Self Help for the Elderly (AWD Congregate Meals)
- Appendix B4 – Budget – Self Help for the Elderly (AWD Congregate Meals)
- Appendix A3 – Services to be Provided – Self Help for the Elderly (AWD Home-Delivered Meals)
- Appendix B5 – Budget – Self Help for the Elderly (AWD Home-Delivered Meals)

Appendix A - Services to be Provided
Bayview Hunters Point Multipurpose Senior Services, Inc.
Elderly Nutrition Program (ENP) Congregate Meals
July 1, 2016 – June 30, 2017

I. Purpose

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

II. Definitions

Grantee	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
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Adult and Aging Services
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
HSA	Human Services Agency of the City and County of San Francisco
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the project provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2

meals per day; (c) At least 100% of the DRIs if the project provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

Nutrition Education

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

OOA

Office on the Aging

CA-GetCare

A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.

Low-Income

100% of poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.

Minority

An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

Registered Dietitian (RD)

Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration.

Title 22 Regulations

Refers to Barclay's official California Code of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program. http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

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

IV. Eligibility for Services

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

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

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
 2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- C. Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented at least three times a year by a RD. The HACCP monitoring must be conducted on site for each congregate site and documented by a R.D. or food safety

certified individual at least three times a year. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist by April 30 of each funding year. The survey tool will be provided by OOA.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use either reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.
<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

VI. Service Objectives

- A. Grantee will serve the total of 1,657 unduplicated consumers
- B. Grantee will serve the total number of 59,029 authorized meals
- C. Grantee will provide nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

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

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs;

agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, hours of operation are current according to the site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.

- B. **Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.
- G. Grantee will provide other reports as requested.
- H. Apart from the on-line reporting via CaGetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be

entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Elena Baranoff (Worker #GB24)
Senior Contract Manager/HSA
P.O. Box 7988
San Francisco, CA 94120

Elena.Baranoff@sfgov.org

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

Sarah.Chan@sfgov.org

**HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES
 BUDGET PROPOSAL FORMS**

Grantee's Name: **Bayview Hunters Point Multipurpose Senior Services, Inc.**

Grant Term

(Check One) New Renewal Modification

Effective Date of Mod:

No. of Mod:

7/1/16 to 6/30/17

Average cost/meal

Program: ENP Congregate Meals			TOTAL	
Annual #Meals Contracted	59,029		59,029	
Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17	

DAAS Expenditures				
Salaries & Benefits	\$166,396		\$166,396	\$2.82
Operating Expense	\$229,691		\$229,691	\$3.89
Subtotal	\$396,087		\$396,087	\$6.71
Indirect Percentage (max 10%)	0%		0%	
Indirect Cost (Line 14 X Line 13)	\$0		\$0	\$0.00
Capital Expenditure	\$0		\$0	\$0.00
TOTAL DAAS EXPENDITURES	\$396,087		\$396,087	\$6.71

Non-DAAS Expenditures				
Salaries & Benefits	\$60,022		\$60,022	\$1.02
Operating Expense	\$0		\$0	\$0.00
Capital Expenditure	\$0		\$0	\$0.00
TOTAL Non-DAAS EXPENDITURES	\$60,022		\$60,022	\$1.02

TOTAL DAAS & Non-DAAS EXPENDITURES	\$456,109		\$456,109	\$7.73
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HSA-DAAS Revenues				
Meals	\$396,087		\$396,087	
TOTAL HSA-DAAS REVENUES	\$396,087		\$396,087	
PER MEAL COST, HSA-DAAS	\$6.71		\$6.71	

Non-DAAS Revenues				
Project Income	29,515		\$29,515	\$0.50
Agency Cash - Fundraising	\$11,736		\$11,736	\$0.20
Agency In-Kind Volunteer	\$18,772		\$18,772	\$0.32
TOTAL NON HSA-DAAS REVENUES	\$60,022		\$60,022	
PER MEAL COST, NON HSA-DAAS	\$1.02		\$1.02	
TOTAL REVENUES	\$456,109		\$456,109	
PER MEAL COST, TOTAL	\$7.73		\$7.73	

Full Time Equivalent (FTE)			Date:
Prepared by: Justin Cheung	Phone No.: 415-826-4774		Date:
HSA-CO Review Signature:			Date:
HSA #1 (11/14/13)			

Salaries & Benefits Detail

H.S.A-DAAS POSITION TITLE and NAME	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17	TOTAL
	Annual Full TimeSalary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	7/1/16 to 6/30/17
Chef - Loggins	\$47,840	100%	52%	52%	\$24,925	\$24,925
Chef Assistant - Thomas	\$36,721	100%	52%	52%	\$19,106	\$19,106
Program Director - Bill	\$47,133	100%	50%	50%	\$23,567	\$23,567
Site Mgmt - Dr. Davis	\$31,200	100%	30%	30%	\$9,360	\$9,360
Site Mgmt - WASC	\$31,200	100%	30%	30%	\$9,360	\$9,360
Kitchen Assist - WASC	\$31,200	100%	30%	30%	\$9,360	\$9,360
Kitchen Assist - Dr. Davis	\$31,200	100%	30%	30%	\$9,360	\$9,360
Driver - Porter	\$31,200	100%	30%	30%	\$9,360	\$9,360
Site mgmt - Rosa Park	\$31,200	100%	30%	30%	\$9,360	\$9,360
Janitor	\$31,200	100%	30%	30%	\$9,360	\$9,360
TOTALS	\$ 350,094	10.00	3.12	3.12	\$133,117	\$133,117

FRINGE BENEFIT RATE

25.00%

EMPLOYEE FRINGE BENEFITS

\$ 87,524				\$33,279	\$33,279
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TOTAL DAAS SALARIES & BENEFITS

\$ 437,618				\$166,396	\$166,396
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Non - DAAS

POSITION TITLE and NAME	Agency Totals		For DAAS Meal		Budgeted Salary	TOTAL
	Annual Full TimeSalary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE		
Chef - Loggins	\$47,840	100%	11.50%	11.50%	\$5,500	\$5,500
Chef Assistant - Thomas	\$36,721	100%	14.98%	14.98%	\$5,500	\$5,500
Site Mgmt - Dr. Davis	\$31,200	100%	17.63%	17.63%	\$5,500	\$5,500
Site Mgmt - WASC	\$31,200	100%	17.63%	17.63%	\$5,500	\$5,500
Kitchen Assist - WASC	\$31,200	100%	17.63%	17.63%	\$5,500	\$5,500
Kitchen Assist - Dr. Davis	\$31,200	100%	17.63%	17.63%	\$5,500	\$5,500
Meal site & kitchen volunteers	\$27,040	100%	69.42%	69.42%	\$18,772	\$18,772
TOTAL NON-DAAS	\$ 236,401	7.00	1.66	1.66	\$51,772	\$51,772

FRINGE BENEFIT RATE

25%

EMPLOYEE FRINGE BENEFITS

\$ 59,100				\$8,250	\$8,250
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TOTAL Non-DAAS SALARIES & BENEFITS

\$ 295,501				\$60,022	\$60,022
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TOTAL DAAS & Non-DAAS SALARIES & BENEFITS

\$ 733,119				\$226,418	\$226,418
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Grantee's Name: Bayview Hunters Point Multipurpose Senior Services, Inc.
 Program Name: ENP Congregate Meals

Appendix B, Page 3
 Document Date: 6/10/16

H.S.A-DAAS		Annual #Meals Contracted:	59,029	TOTAL	
Expenditure Category		Term:	7/1/16 to 6/30/17	7/1/16 to 6/30/17	
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
FOOD COSTS					
Raw Food	per meal \$ 3.25		\$191,844	\$	191,844
Cong Food Svc Supplie:	per meal \$ 0.50		\$29,515	\$	29,515
HDM Food Svc Supplie	per meal				
Catered Meals	per meal				
CONSULTANT/SUBCONTRACTOR Descriptive Title					
Registered Dietitian					
OTHER COSTS:					
Insurance			\$3,000	\$	3,000
Staff Training & Travel			\$932	\$	932
Rental of Equipment					
Small equipment & Supplies					
Auto - Fuel & Insurance			\$2,400	\$	2,400
Repair/Maintenance			\$2,000	\$	2,000
TOTAL DAAS OPERATING EXPENSE			\$229,691	\$	229,691
Non-DAAS				TOTAL	
Expenditure Category					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
FOOD COSTS					
Raw Food	per meal				
Cong Food Svc Supplie:	per meal				
HDM Food Svc Supplie	per meal				
Catered Meals	per meal \$ -				
CONSULTANT/SUBCONTRACTOR Descriptive Title					
Registered Dietitian					
OTHER COSTS:					
Insurance					
Staff Training & Travel					
Rental of Equipment					
Rental of Equipment					
Small equipment & Supplies					
Auto - Fuel & Insurance					
Repair/Maintenance					
TOTAL Non-DAAS OPERATING EXPENSE			\$0	\$	-
TOTAL DAAS & Non-DAAS OPERATING EXPENSE			\$229,691	\$	229,691

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

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

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
16	\$150	150	0

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

3	600	600	0
---	-----	-----	---

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

12	250	250	0
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Menu Planning & Analysis (1 unit = 1 set menu completed)

2	700	700	0
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HDM Assessment (1 units = annual intake assessment & reassessment completed)

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OTHER Nutrition Compliance:

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

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

0			

NOTES:

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

Budget Narrative:

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Contractor Name: Bayview Hunters Point Multipurpose Senior Services, Inc.	Term July 1, 2016 to June 30, 2017
------------------------------------------------------------------------------	---------------------------------------

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

Program: ENP Nutrition Compliance	REVENUE Cost Allocation:			
Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
Program Term	7/1/16-6/30/17			
Expenditures				
Nutrition Education				
Salaries & Benefits	\$2,400	\$2,400	\$0	\$2,400
Operating Expense	\$0	\$0	\$0	\$0
Subtotal Direct	\$2,400	\$2,400	\$0	\$2,400
Indirect Percentage				\$0
Indirect Expense	\$0	\$0	\$0	\$0
Total Nutrition Education	\$2,400	\$2,400	\$0	\$2,400
HCCP Kitchen Monitoring				
Salaries & Benefits	\$1,800	\$1,800	\$0	\$1,800
Operating Expense	\$0	\$0	\$0	\$0
Subtotal Direct	\$1,800	\$1,800	\$0	\$1,800
Indirect Percentage				\$0
Indirect Expense	\$0	\$0	\$0	\$0
Total HCCP Kitchen Monitoring	\$1,800	\$1,800	\$0	\$1,800
Site/Route Monitoring				
Salaries & Benefits	\$3,000	\$3,000	\$0	\$3,000
Operating Expense	\$0	\$0	\$0	\$0
Subtotal Direct	\$3,000	\$3,000	\$0	\$3,000
Indirect Percentage				\$0
Indirect Expense	\$0	\$0	\$0	\$0
Total Site/Route Monitoring	\$3,000	\$3,000	\$0	\$3,000
Menu Planning				
Salaries & Benefits	\$1,400	\$1,400	\$0	\$1,400
Operating Expense	\$0	\$0	\$0	\$0
Subtotal Direct	\$1,400	\$1,400	\$0	\$1,400
Indirect Percentage				\$0
Indirect Expense	\$0	\$0	\$0	\$0
Total Menu Planning	\$1,400	\$1,400	\$0	\$1,400
GRAND Total Expenditures	\$8,600	\$8,600	\$0	\$8,600
HSA Revenues		\$8,600		\$8,600
TOTAL HSA REVENUES		\$8,600		\$8,600
Other Non-H.S.A.-DAAS Revenues				\$0
TOTAL OTHER REVENUES			\$0	\$0

Full Time Equivalent (FTE)

Prepared by: Justin Cheung

Telephone No.: 415-826-4774

Date 6/6/16

HSA-CO Review Signature: _____

HSA #1

5/19/2016

Grantee's Name: Bayview Hunter's Point Multipurpose Senior Services
 Program Name: ENP Nutrition Compliance

Site/Route & Kitchen Monitoring Salaries & Benefits Detail

7/1/16-6/30/17

POSITION TITLE	Agency Totals		For HSA Program		For HSA Program	REVENUE Cost Allocation:		Total Revenue
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
SITE OR ROUTE MONITORING:	\$83,200	25%	12%	3%	\$2,400	\$2,400		\$2,400
TOTALS	\$83,200	0.25	0.12	0.03	\$2,400	\$2,400		\$2,400
FRINGE BENEFIT RATE	25%							
EMPLOYEE FRINGE BENEFITS	\$20,800				\$600	\$600		\$600
TOTAL SALARIES & BENEFITS	\$104,000				\$3,000	\$3,000		\$3,000
HSA #2	5/19/2016							

Appendix A- Services to be Provided
Candice Tang, R.D.
Nutrition Compliance for Elderly Nutrition Program (ENP)
Congregate and Home-Delivered Meals Programs
July 1, 2016– June 30, 2017

I. Purpose

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

II. Definitions

Grantee	Candice Tang
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Adult and Aging Services
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
HSA	Human Services Agency of the City and County of San Francisco
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy

of Sciences, if the project provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the project provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

Nutrition Education

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

OOA

Office on the Aging

CA-GetCare

A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.

Low-Income

100% of poverty level. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.

Minority

An ethnic person of color who is any of the following:
a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

Registered Dietitian

Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586,

Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration.

Title 22 Regulations

Refers to Barclay's official California Cod of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Services to be Provided

- A. Grantee will assist the selected DAAS-funded nutrition agencies to meet the nutrition and food service standards set forth by Title 22 Regulations, California Department of Aging and Office on the Aging, ensuring the provision of quality meals that meet nutrition, HACCP and food safety standards, and enabling meal program participants to reduce incidences of chronic diseases and maintain independent living.

- B. Grantee will provide Nutrition compliance components and service units as indicated in Appendix B (detailed in Attachment A) and agreed between the grantee, Registered Dietitian and the five DAAS-funded nutrition agencies: Episcopal Community Service, Jewish Community Center of San Francisco, Jewish Family and Children's Services, Samoan Community Development Center, and Russian American Community Services. The Registered Dietitian will provide technical assistance to the nutrition agencies:
 - 1) Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (Cal Code).
 - 2) Conduct site visit to monitor the safety and sanitation components of the nutrition program. A HACCP safety and sanitation monitoring for the production kitchen and meal site must be conducted on site and documented at least three times a year by a R.D. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA and nutrition agency on a timely basis.
 - 3) Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
 - 4) Nutrition education provision including providing assistance to agency on gathering annual nutrition education assessment data, if needed.

- C. Grantee will ensure adequate and culturally competent Registered Dietitian to service the nutrition agencies.

- D. Grantee will attend the mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.

- E. Grantee will have a signed Agreement to collaborate with the designated nutrition agencies to clarify the expectations and responsibilities between the parties involved and share a copy with DAAS-OOA.

- F. Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. See Appendix F and Exhibit E.

The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.

<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

IV. Service Objectives

On an annual basis:

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

V. Outcome Objectives

- A. To provide consulting services that attains a high satisfaction level from the DAAS designated nutrition agencies. These agencies will have the resources needed to be in compliance with the nutrition program standards.
- B. Submit quarterly HACCP safety and sanitation monitoring reports within 30 days after the site visits are conducted
- C. In annual satisfaction survey, at least 85% of participating agencies are satisfied with the technical assistance services delivered.
- D. In annual satisfaction survey, at least 85% of participating agencies are satisfied with the training services delivered.

VI. Monitoring Activities

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

VII. Reporting Requirements

- A. Grantee will submit appropriate documentation of the nutrition monitoring visits to OOA and the nutrition agency by the scheduled due dates.
- B. Grantee will submit menu and nutrient analysis as specified in the service units.
- C. Grantee will provide a quarterly report of number of services provided as described in Section IV – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of nutrition compliance units provided.

- D. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- E. Grantee will provide other reports as requested.
- F. Apart from the on-line reporting via CaGetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Steve Kim
Contract Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Steve.Kim@sfgov.org

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

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Total Congregate & HDM:

Nutrition Education:

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

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
8	\$ 150	\$ 150	0

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

15 \$ 600 \$ 600 0

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

34 \$ 250 \$ 250 0

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

11 \$ 700 \$ 700 0

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

6	\$ 50	\$ 50	0
0			
6	\$ 50	\$ 50	

OTHER Nutrition Compliance:

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

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

Congregate Nutrition Compliance

Nutrition Education:

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

Proposed Service Units:

Year 1	Unit cost	Total
6	\$ 150	\$ 900
9	\$ 600	\$ 5,400
24	\$ 250	\$ 6,000
6	\$ 700	\$ 4,200
3	\$ 50	\$ 150
Total		\$ 16,650

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

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

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

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

OTHER Nutrition Compliance:

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

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

Total

Proposed Service Units:

Home Delivered Meal Nutrition Compliance

Nutrition Education:

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

Year 1	Unit cost	Total
2	\$ 150	\$ 300
6	\$ 600	\$ 3,600
10	\$ 250	\$ 2,500
5	\$ 700	\$ 3,500
3	\$ 50	\$ 150
Total		\$ 10,050
		\$ 26,700

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

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

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

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

OTHER Nutrition Compliance:

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

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

Total

Grand Total (Congregate & HDM)

NOTES:

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

Budget Narrative:

	A	B	C	D	E
1	Appendix B, Page 1				
2	HUMAN SERVICES AGENCY BUDGET SUMMARY				
3					
4					
5	Contractor Name			Term	
6	Candice Tang, RD			July 1, 2016 to June 30, 2017	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Nutrition Compliance for ENP- Congregate & HDM		REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits	\$1,000	\$1,000		\$1,000
15	Operating Expense	\$200	\$200		\$200
16	Subtotal Direct	\$1,200	\$1,200		\$1,200
17	Indirect Percentage				
18	Indirect Expense				
19	Total Nutrition Education	\$1,200	\$1,200		\$1,200
20	Nutrition Counseling				
21	Salaries & Benefits				
22	Operating Expense				
23	Subtotal Direct				
24	Indirect Percentage				
25	Indirect Expense				
26	Total Nutrition Counseling				
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits	\$8,160	\$8,160		\$8,160
29	Operating Expense	\$840	\$840		\$840
30	Subtotal Direct	\$9,000	\$9,000		\$9,000
31	Indirect Percentage				
32	Indirect Expense				
33	Total HCCP Kitchen Monitoring	\$9,000	\$9,000		\$9,000
34	Site/Route Monitoring				
35	Salaries & Benefits	\$8,245	\$8,245		\$8,245
36	Operating Expense	\$255	\$255		\$255
37	Subtotal Direct	\$8,500	\$8,500		\$8,500
38	Indirect Percentage				
39	Indirect Expense				
40	Total Site/Route Monitoring	\$8,500	\$8,500		\$8,500
41	Menu Planning				
42	Salaries & Benefits	\$7,540	\$7,540		\$7,540
43	Operating Expense	\$160	\$160		\$160
44	Subtotal Direct	\$7,700	\$7,700		\$7,700
45	Indirect Percentage				
46	Indirect Expense				
47	Total Menu Planning	\$7,700	\$7,700		\$7,700
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	\$300	\$300		\$300
57	Operating Expense				
58	Subtotal Direct	\$300	\$300		\$300
59	Indirect Percentage				
60	Indirect Expense				
61	Total Other Nutrition Compliance	\$300	\$300		\$300
62	GRAND Total Expenditures	\$26,700	\$26,700		\$26,700
63	HSA Revenues				
64	DAAS		\$26,700		\$26,700
65					
66	TOTAL HSA REVENUES		\$26,700		\$26,700
67	Other Non-H.S.A.-DAAS Revenues				
68					
69					
70					
71	TOTAL OTHER REVENUES				
72	Full Time Equivalent (FTE)				
74	Prepared by:	Candice Tang, RD	Telephone No.:	415-812-5123	6/7/2016
75	HSA-CO Review Signature: _____				
76	HSA #1				5/19/2016

Program: Nutrition Compliance for ENP- Congregate & HDM

Nutrition Education Operating Expense Detail

11	Expenditure Category	TERM	REVENUE Cost Allocation:		TOTAL REVENUE
			7/1/16-6/30/17	H.S.A.-DAAS	
12	Rental of Property				
13	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$10	\$10	\$10
14	Office Supplies, Postage		\$50	\$50	\$50
15	Building Maintenance Supplies and Repair				
16	Printing and Reproduction		\$40	\$40	\$40
17	Insurance		\$80	\$80	\$80
18	Staff Training				
19	Staff Travel		\$20	\$20	\$20
20	Small Equipment (over \$500 but under \$5,000/item)				
21	Rental of Equipment				
22					
23	SUBCONTRACTORS Descriptive Title				
24					
25					
26					
27					
28					
29	OTHER				
30					
31					
32					
33					
34					
35					
36	TOTAL OPERATING EXPENSE		\$200	\$200	\$200
37					
38	HSA #3				5/19/2016

Program: Nutrition Compliance for ENP- Congregate & HDM

HCCP Kitchen Monitoring Operating Expense Detail

Expenditure Category	TERM 7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$30	\$30		\$30
Office Supplies, Postage	\$50	\$50		\$50
Building Maintenance Supplies and Repair				
Printing and Reproduction	\$30	\$30		\$30
Insurance	\$30	\$30		\$30
Staff Training				
Staff Travel	\$200	\$200		\$200
Small Equipment (over \$500 but under \$5,000/item)	\$500	\$500		\$500
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
TOTAL OPERATING EXPENSE	\$840	\$840		\$840
HSA #3				5/19/2016

Program: Nutrition Compliance for ENP- Congregate & HDM

Site/Route & Kitchen Monitoring Salaries & Benefits Detail

7/1/16-6/30/17

10	POSITION TITLE	Agency Totals		For HSA Program		For HSA Program	REVENUE Cost Allocation:		Total Revenue
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
11	SITE OR ROUTE MONITORING:	\$76,000	35%	31%	10.85%	\$8,245	\$8,245		\$8,245
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28	TOTALS	\$76,000	0.35	0.31	0.11	\$8,245	\$8,245		\$8,245
29	FRINGE BENEFIT RATE	0%							
31	EMPLOYEE FRINGE BENEFITS	\$0				\$0	\$0		\$0
32									
33									
34	TOTAL SALARIES & BENEFITS	\$76,000				\$8,245	\$8,245		\$8,245
35	HSA #2	5/19/2016							

Program: Nutrition Compliance for ENP- Congregate & HDM

Site/Route & Kitchen Monitoring Operating Expense Detail

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3											
4	Program: Nutrition Compliance for ENP- Congregate & HDM										
5											
6	Site/Route & Kitchen Monitoring Operating Expense Detail										
7											
8											
9											
10											
11	Expenditure Category			TERM	<u>7/1/16-6/30/17</u>		REVENUE	Cost Allocation:			TOTAL
							H.S.A.-DAAS	DAAS			REVENUE
12	Rental of Property										
13	Utilities(Elec, Water, Gas, Phone, Scavenger)										
14	Office Supplies, Postage				\$15		\$15				\$15
15	Building Maintenance Supplies and Repair										
16	Printing and Reproduction				\$10		\$10				\$10
17	Insurance				\$30		\$30				\$30
18	Staff Training										
19	Staff Travel				\$200		\$200				\$200
20	Small Equipment (over \$500 but under \$5,000/item)										
21	Rental of Equipment										
22											
23	SUBCONTRACTORS Descriptive Title										
24											
25											
26											
27											
28											
29	OTHER										
30											
31											
32											
33											
34											
35											
36	TOTAL OPERATING EXPENSE				\$255		\$255				\$255
37											
38	HSA #3										5/19/2016

Program: Nutrition Compliance for ENP- Congregate & HDM

Menu Planning Operating Expense Detail

<u>Expenditure Category</u>	<u>TERM 7/1/16-6/30/17</u>	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$50	\$50		\$50
Office Supplies, Postage	\$30	\$30		\$30
Building Maintenance Supplies and Repair				
Printing and Reproduction	\$60	\$60		\$60
Insurance	\$20	\$20		\$20
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
TOTAL OPERATING EXPENSE	\$160	\$160		\$160
HSA #3				5/19/2016

Program: Nutrition Compliance for ENP- Congregate & HDM

Other Nutrition Compliance Salaries & Benefits Detail

7/1/16-6/30/17

POSITION TITLE	Agency Totals		For HSA Program		For HSA Program	REVENUE Cost Allocation:		Total Revenue
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
In-Service Training:				0%	\$0			\$0
Attend OOA Quarterly Nutrition Meeting:								
	\$76,000	35%	1%	0.39%	\$300	\$300		\$300
TOTALS	\$76,000	0.35	0.01	0.00	\$300	\$300		\$300
FRINGE BENEFIT RATE	0%							
EMPLOYEE FRINGE BENEFITS	\$0				\$0	\$0		\$0
TOTAL SALARIES & BENEFITS	\$76,000				\$300	\$300		\$300
HSA #2								
	5/19/2016							

**Appendix A – Services to be Provided
 Centro Latino de San Francisco
 Elderly Nutrition Program (ENP) Congregate Meals
 July 1, 2016– June 30, 2017**

I. Purpose

The purpose of this grant is to assist older individuals living in San Francisco and 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 system
CDA	California Department of Aging
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting, and serving of meals, as well as nutrition education that meets the needs of the service population.
DAAS	Department of Adult and Aging Services
HACCP	Hazard Analysis of Critical Control Points: a prevention-based food safety system focusing on time and temperature control at different crucial food service system points.
HSA	Human Services Agency of the City and County of San Francisco
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the project provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the project provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

Nutrition Education	The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education services shall be provided by a dietitian or by personnel trained or approved by the dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a qualified dietitian. Coordination with community resource is encouraged. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. The nutrition education activities shall be provided on quarterly basis and documented. One unit is defined as one nutrition education presentation provided to one participant.
OOA	Office on the Aging
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
Low-Income	100% of poverty level. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Registered Dietitian	Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration.
Title 22 Regulations	Refers to Barclay’s official California Code of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program. http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

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

IV. Eligibility for Services

To participate in Congregate Meals, an individual must meet either one or more of the following criteria:

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

V. SERVICES TO BE PROVIDED

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
 2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- C. Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (Cal Code).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented at least three times a year by an R.D. The HACCP monitoring must be conducted on site for each congregate site and documented by an R.D. or food safety certified individual at least three times a year. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis.
- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by an R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist by April 30 of each funding year. The survey tool will be provided by OOA.

- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use reusable, biodegradable, compostable, and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
- K. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.
<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

VI. Service Objectives

- A. Grantee will provide 45,472 meals
- B. Grantee will serve 1,120 unduplicated consumers.
- C. Grantee will provide nutrition compliance units as indicated in Appendix B1.

VII. Outcome Objectives

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

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFD and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, hours of operation are current according to the site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement,

fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
 - The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicate that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.
- G. Grantee will provide other reports as requested.
- H. Apart from the on-line reporting via 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

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

	A	B	C	D	E
1	Appendix B, pg. 1				
2	Document Date: 6/2/2016				
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: Centro Latino de San Francisco, Inc.			Grant Term	
6	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>				
7	Effective Date of Mod:	No. of Mod:	7/1/16 to 6/30/17		
8	Program: Congregate-ENP				TOTAL
9	Annual #Meals Contracted	45,472			45,472
10	Program Term	7/1/16 to 6/30/17			7/1/16 to 6/30/17
11	Expenditures				
12	Salaries & Benefits	\$201,436			\$201,436
13	Operating Expense	\$101,406			\$101,406
14	Subtotal	\$302,842			\$302,842
15	Indirect Percentage (max 10%)				
16	Indirect Cost (Line 14 X Line 13)				
17	Capital Expenditure				
18	TOTAL DAAS EXPENDITURES	\$302,842			\$302,842
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$41,969			\$41,969
22	Operating Expense	\$79,017			\$79,017
23	Capital Expenditure				
24	TOTAL Non-DAAS EXPENDITURES	\$120,986			\$120,986
25					
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$423,828			\$423,828
27					
28	HSA-DAAS Revenues				
29	Meals	\$302,842			\$302,842
30					
31					
32					
33					
34	TOTAL HSA-DAAS REVENUES	\$302,842			\$302,842
35	PER MEAL COST, HSA-DAAS	\$6.66			\$6.66
36	Non-DAAS Revenues				
37	Project Income	33,238			\$33,238
38	Agency Cash - Fundraising				
39	Agency In-Kind Volunteer	\$41,969			\$41,969
40	Facility Rental In-Kind	\$45,779			\$45,779
41	Nutrition Compliance/Quality Assurance				
42					
43					
44	TOTAL NON HSA-DAAS REVENUES	\$120,986			\$120,986
45	PER MEAL COST, NON HSA-DAAS	\$2.66			\$2.66
46	TOTAL REVENUES	\$423,828			\$423,828
47	PER MEAL COST, TOTAL	\$9.32			\$9.32
48	Full Time Equivalent (FTE)				
50	Prepared by: Gloria Bonilla	Phone No.: 415-286-0883			
51	HSA-CO Review Signature: _____	Date: _____			
52	HSA #1 (11/14/13)				

	A	B	C	D	E	F	G	H	I	J	K	L
1	Grantee's Name: Centro Latino de San Francisco, Inc.										Appendix B, pg. 2	
2	Program Name: Congregate-ENP										Document Date: 6/2/2016	
3												
4												
5	Salaries & Benefits Detail											
6												
7												
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17						TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/16 to 6/30/17			
10	Executive Director, Bonilla, Gloria	\$78,208	95%	48%	45%	35,507			\$35,507			
11	Nutritionist/Activities Facilitator, Alvarez, Flor	\$43,680	75%	17%	13%	5,729			\$5,729			
12	Site Manager / Food Prep, Monge, Maria	\$29,120	100%	67%	67%	19,550			\$19,550			
13	Cook I, Crespin, Dora	\$41,600	100%	68%	68%	28,163			28,163			
14	Accountant/HR, Riano, Olivia	\$58,240	38%	23%	9%	4,989			4,989			
15	Social Worker, Rivera, Sylvia	\$41,600	88%	15%	13%	5,591			\$5,591			
16	Driver III/ Food Purchaser, Olivar, Joaquin	\$28,080	58%	11%	6%	1,825			\$1,825			
17	Programs Coordinator, Poveda, Olga	\$41,600	50%	31%	15%	6,396			6,396			
18	Manager - VC, Matus Rojas, Sofia	\$28,080	75%	68%	51%	14,246			14,246			
19	Anaya, Castaneda, Domingo	\$28,080	63%	60%	37%	10,515			10,515			
20	ESL Citizenship Instructor/Coordinator-Sarti, Maria	\$43,680	88%	6%	5%	2,182			2,182			
21	Cook I - Asst., Ramirez, Olga	\$29,120	75%	87%	65%	18,901			18,901			
22	Data Entry Clerk- Martinez, Oscar	\$28,080	23%	82%	19%	5,265			5,265			
23	Food Service/Act Asst.- Romero, Omar	\$31,200	100%	33%	33%	10,405			10,405			
24	Custodian, Driver II - Michel, Javier	\$29,120	15%	100%	15%	4,388			\$4,388			
25	TOTALS	\$ 579,488				\$173,652			\$173,652			
26												
27	FRINGE BENEFIT RATE	16.00%										
28	EMPLOYEE FRINGE BENEFITS	\$ 92,718				\$27,784			\$27,784			
29												
30												
31	TOTAL DAAS SALARIES & BENEFITS	\$ 672,206				\$201,436			\$201,436			
32												
33												
34	Non - DAAS	Agency Totals		For DAAS Meal								TOTAL
35	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/13 to 6/30/16			
36	Volunteer - Food Service Ipolito Bamaca	\$ 27,040	36%	91%	32%	\$8,759			\$8,759			
37	Volunteer - Food service & Client Registration Maria Hernandez	\$ 27,040	49%	62%	30%	\$8,184			\$8,184			
38	Volunteer- Food Service Ana Ruiz	\$ 27,040	12%	100%	12%	\$3,168			\$3,168			
39	Volunteer- Food Service Luz Dominguez	\$ 27,040	29%	92%	27%	\$7,286			\$7,286			
40	Client Registration Sylvia Lopez	\$ 27,040	29%	92%	27%	\$7,286			\$7,286			
41	Volunteer - Food Service Maria Beltran	\$ 27,040	29%	92%	27%	\$7,286			\$7,286			
42												
43												
44												
45												
46												
47												
48												
49												
50												
51												
52												
53	TOTAL NON-DAAS	\$ 162,240				\$41,969			\$41,969			
54												
55	FRINGE BENEFIT RATE											
56	EMPLOYEE FRINGE BENEFITS	\$0				\$0			\$0			
57												
58												
59	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 162,240				\$41,969			\$41,969			
60												
61	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 834,446				\$243,405			\$243,405			

	A	B	C	D	E	F	G	H	I	J	K
1	Grantee's Name: Centro Latino de San Francisco, Inc.										Appendix B, pg. 3
2	Program Name: Congregate-ENP										Document Date: 6/2/2016
3											
4	Operating Expense Detail										
5											
7	H.S.A-DAAS	Annual #Meals Contracted:	45,472							TOTAL	
8	Expenditure Category	Term:	7/1/16 to 6/30/17							7/1/16 to 6/30/17	
9	Rental of Property										
10	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$19,624					\$19,624	
11	Office Supplies, Postage				\$971					\$971	
12	Building Maintenance Supplies and Repair				\$1,961					\$1,961	
13	FOOD COSTS										
14	Raw Food	per meal \$ 0.83			\$38,126					\$38,126	
15	Cong Food Svc Supplies	per meal \$ 0.20			\$9,149					\$9,149	
16	HDM Food Svc Supplies	per meal									
17	Catered Meals	per meal									
18	CONSULTANT/SUBCONTRACTOR Descriptive Title										
19	Consultant				\$450					\$450	
20											
21	OTHER COSTS:										
22	Payroll Services				\$1,331					\$1,331	
23	Accounting / Audit Fees				\$6,626					\$6,626	
24	Stipends				\$2,400					\$2,400	
25	Insurance(Liability)				\$7,077					\$7,077	
26	Insurance(Vehicle)				\$11,267					\$11,267	
27	Vehicle Costs				\$1,774					\$1,774	
28	Printing				\$475					\$475	
29	Staff Dev				\$175					\$175	
30	TOTAL DAAS OPERATING EXPENSE				\$101,406					\$101,406	
32	Non-DAAS										TOTAL
33	Expenditure Category	Program									
34	Rental of Property										
35	Utilities(Elec, Water, Gas, Phone, Scavenger)										
36	Office Supplies, Postage										
37	Building Maintenance Supplies and Repair										
38	FOOD COSTS										
39	Raw Food	per meal \$ 0.73			\$33,238					\$33,238	
40	Cong Food Svc Supplies	per meal									
41	HDM Food Svc Supplies	per meal									
42	Catered Meals	per meal									
43	CONSULTANT/SUBCONTRACTOR Descriptive Title										
44	Registered Dietitian										
45											
46	OTHER COSTS:										
47	Facility Rental In-Kind				\$45,779					\$45,779	
48											
49											
50											
51											
52	TOTAL Non-DAAS OPERATING EXPENSE				\$79,017					\$79,017	
53											
54	TOTAL DAAS & Non-DAAS OPERATING EXPENSE				\$180,423					\$180,423	

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

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

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
12	12	\$150	

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

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

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

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

OTHER Nutrition Compliance:

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

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

4	4	\$150	

NOTES:

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

	A	B	C	D	E
1					
2					
3					
4					
5	Contractor Name			Term	
6	Centro Latino de San Francisco, Inc.			July 1, 2016 to June 30, 2017	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: ENP Nutrition Compliance		REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			7/1/16-6/30/17
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits	\$2,400	\$2,400		\$2,400
15	Operating Expense				
16	Subtotal Direct	\$2,400	\$2,400		\$2,400
17	Indirect Percentage				
18	Indirect Expense				
19	Total Nutrition Education	\$2,400	\$2,400		\$2,400
20	Nutrition Counseling				
21	Salaries & Benefits				
22	Operating Expense				
23	Subtotal Direct				
24	Indirect Percentage				
25	Indirect Expense				
26	Total Nutrition Counseling				
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits				
29	Operating Expense				
30	Subtotal Direct				
31	Indirect Percentage				
32	Indirect Expense				
33	Total HCCP Kitchen Monitoring				
34	Site/Route Monitoring				
35	Salaries & Benefits				
36	Operating Expense				
37	Subtotal Direct				
38	Indirect Percentage				
39	Indirect Expense				
40	Total Site/Route Monitoring				
41	Menu Planning				
42	Salaries & Benefits				
43	Operating Expense				
44	Subtotal Direct				
45	Indirect Percentage				
46	Indirect Expense				
47	Total Menu Planning				
48	HDM Assessments				
49	Salaries & Benefits				
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	\$2,400	\$2,400		\$2,400
63	HSA Revenues	\$2,400	\$2,400		\$2,400
64					
65					
66	TOTAL HSA REVENUES	\$2,400	\$2,400		\$2,400
67	Other Non-H.S.A.-DAAS Revenues				
68					
69					
70					
71	TOTAL OTHER REVENUES				
72	Full Time Equivalent (FTE)	0.0471			
74	Prepared by: Gloria Bonilla	Telephone No.: 415-286-0883		Date 5/25/16	
75	HSA-CO Review Signature: _____				
76	HSA #1				

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

I. Purpose

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

II. Definitions

Grantee	Episcopal Community Services
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Adult and Aging Services
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
HSA	Human Services Agency of the City and County of San Francisco
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the project provides one meal per day; (b)

At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the project provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

Nutrition Education

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

OOA

Office on the Aging

CA-GetCare

A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.

Low-Income

100% of poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.

Minority

An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

Registered Dietitian (RD)

Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the

Commission on Dietetic Registration.

Title 22 Regulations

Refers to Barclay's official California Cod of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

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

IV. Eligibility for Services

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

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

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
 2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- C. Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and

documented at least three times a year by a RD. The HACCP monitoring must be conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist by April 30 of each funding year. The survey tool will be provided by OOA.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use either reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.
<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

VI. Service Objectives

- A. Grantee will serve the total of 769 unduplicated consumers
- B. Grantee will serve the total number of 26,271 authorized meals

VII. Outcome Objectives

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

VIII. Monitoring Activities

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

collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, hours of operation are current according to the site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.
- G. Grantee will provide other reports as requested.

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

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

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

	A	B	C	D	E
1	BUDGET FORMS			Appendix B, pg. 1	
2				Document Date: 5/23/2016	
3					
4	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
5	BUDGET PROPOSAL FORMS				
6	Grantee's Name: EPISCOPAL COMMUNITY SERVICES		Grant Term		
7			7/1/16 to 6/30/17		
8	Program: Cong-ENP, HDM-ENP, Cong-AWD, HDM-AWD	Cong-ENP		TOTAL	Average cost/meal
9	Annual #Meals Contracted	26,271		26,271	
10	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17	
11	DAAS Expenditures				
12	Salaries & Benefits	\$152,279		\$152,279	\$5.80
13	Operating Expense	\$7,287		\$7,287	\$0.28
14	Subtotal	\$159,566		\$159,566	\$6.07
15	Indirect Percentage (%)	10%		10%	
16	Indirect Cost (Line 14 X Line 13)	\$15,956		\$15,956	\$0.61
17	Capital Expenditure	\$0		\$0	\$0.00
18	TOTAL DAAS EXPENDITURES	\$175,522		\$175,522	\$6.68
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$82,989		\$82,989	\$3.16
22	Operating Expense	\$93,191		\$93,191	\$3.55
23	Indirect Cost	\$17,618		\$17,618	\$0.67
24	TOTAL Non-DAAS EXPENDITURES	\$193,798		\$193,798	\$7.38
25					
26	EXPENDITURES	\$369,320		\$369,320	\$14.06
27					
28	HSA-DAAS Revenues				
29	Meals	\$175,522		\$175,522	
30					
31	TOTAL HSA-DAAS REVENUES	\$175,522		\$175,522	
32	Per MEAL COST, HSA-DAAS	\$6.68		\$6.68	
33	PER MEAL (w-NCQA) COST, HSA-DAAS	\$6.68			
34	Non-DAAS Revenues				
35	Project Income	\$1,950		\$1,950	\$0.07
36	Agency Cash - Fundraising	\$134,575		\$134,575	\$5.12
37	In-kind Volunteers	\$57,273		\$57,273	\$2.18
38					
39					
40	TOTAL NON HAS-DAAS REVENUES	\$193,798		\$193,798	
41	PER MEAL COST, NON HSA-DAAS	\$7.38			\$7.38
42	TOTAL REVENUES	\$369,320		\$369,320	
43	PER MEAL COST, TOTAL	\$14.06			
44	Full Time Equivalent (FTE)				
45					
46	Prepared by: Eric Larra	Phone No.: 415-487-3300 X1211		5/23/2016	
47	HSA-CO Review Signature:				
48	HSA #1 (9/23/15)				

	A	B	C	D	E	F	G	H
1	Grantee's Name: EPISCOPAL COMMUNITY SERVICES						Appendix B, page 2	
2	Program Name:						Date: 5/23/16	
3	Cong-ENP							
4								
5	Salaries & Benefits Detail							
6								
7								
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17		TOTAL
10	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	ENP Budgeted Salary		7/1/16 to 6/30/17
11	Director	\$94,660	100%	15%	15%	\$11,836		\$11,836
12	CHEFS Kitchens Manager	\$71,480	100%	20%	20%	\$11,917		\$11,917
13	Chef Instructor	\$46,135	80%	100%	80%	\$30,766		\$30,766
14	Associate Chef Instructor	\$37,192	100%	50%	50%	\$15,501		\$15,501
15	Database/Compliance Specialist	\$47,112	100%	25%	25%	\$9,818		\$9,818
16	Congregate Meals ENP/AWD Mgr.	\$60,586	100%	50%	50%	\$25,254		\$25,254
17								
18								
19	TOTALS	\$ 357,165	5.80	2.10	1.90	\$105,092		\$105,092
20								
21	FRINGE BENEFIT RATE	44.90%						
22	EMPLOYEE FRINGE BENEFITS	\$ 160,367				\$47,187		\$47,187
23								
24								
25	TOTAL DAAS SALARIES & BENEFITS	\$ 517,532				\$152,279		\$152,279
26								
27								
28	Non - DAAS	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		7/1/16 to 6/30/17
30	Food Service Volunteer - In Kind	\$27,040	100%	89%	89%	\$23,979		\$23,979
31	Food Service Volunteer - In Kind	\$27,040	100%	80%	80%	\$21,673		\$21,673
32	Food Service Volunteer - In Kind	\$27,040	100%	10%	10%	\$2,767		\$2,767
33	Food Service Volunteer - In Kind	\$27,040	100%	33%	33%	\$8,854		\$8,854
34								
35								
36	TOTAL NON-DAAS	\$ 108,160	4.00	2.12	2.12	\$57,273		\$57,273
37								
38	FRINGE BENEFIT RATE	45%						
39	EMPLOYEE FRINGE BENEFITS	\$ 48,564				\$25,716		\$25,716
40								
41								
42	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 156,724				\$82,989		\$82,989
43								
44	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 674,256				\$235,268		\$235,268

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: EPISCOPAL COMMUNITY SERVICES							Appendix B, page 3	
2	Program Name:							Date: 05/23/16	
3	Cong-ENP								
4	Operating Expense Detail								
6									
7	H.S.A-DAAS	Annual #Meals Contracted:	26,271					TOTAL	
8	<u>Expenditure Category</u>		<u>7/1/16 to 6/30/17</u>					<u>7/1/16 to 6/30/17</u>	
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 \$ 0.27		\$7,027				\$7,027	
15	Cong Food Svc Supplie:	per meal \$ 0.01		\$260				\$260	
16	HDM Food Svc Supplie:	per meal							
17	Catered Meals	per meal							
18	CONSULTANT/SUBCONTRACTOR Descriptive Title								
19									
20									
21	OTHER COSTS:								
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	TOTAL DAAS OPERATING EXPENSE			\$7,287				\$7,287	
31									
32	Non-DAAS								TOTAL
33	<u>Expenditure Category</u>		Program						
34	Rental of Property								
35	Utilities(Elec, Water, Gas, Phone, Scavenger)			\$24,298				\$24,298	
36	Program/Client Supplies			\$3,370				\$3,370	
37	Building Maintenance Supplies and Repair								
38	FOOD COSTS								
39	Raw Food	per meal \$ 2.32		\$60,885				\$60,885	
40	Cong Food Svc Supplie:	per meal							
41	HDM Food Svc Supplie:	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			\$355				\$355	
49	Staff Recruitment/Training & Travel			\$204				\$204	
50	Rental of Equipment								
51	Small equipment & Supplies								
52	Auto - Fuel & Insurance								
53	Repair/Maintenance			\$4,079				\$4,079	
54									
55									
56	TOTAL Non-DAAS OPERATING EXPENSE			\$93,191				\$93,191	
57									
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE			\$100,478				\$100,478	

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

I. Purpose

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

II. Definitions

Grantee	Glide Foundation
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Adult and Aging Services
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
HSA	Human Services Agency of the City and County of San Francisco
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the project provides one meal per day; (b)

At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the project provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

Nutrition Education

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

OOA

Office on the Aging

CA-GetCare

A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.

Low-Income

100% of poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.

Minority

An ethnic person of color who is any of the following:
a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

Registered Dietitian (RD)

Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the

Commission on Dietetic Registration.

Title 22 Regulations

Refers to Barclay's official California Cod of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

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

IV. Eligibility for Services

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

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

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
 2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- C. Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and

sanitation monitoring for the production kitchen must be conducted on site and documented at least three times a year by a RD. The HACCP monitoring must be conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist by April 30 of each funding year. The survey tool will be provided by OOA.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use either reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.

<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

VI. Service Objectives

- A. Grantee will serve the total of 570 unduplicated consumers
- B. Grantee will serve the total number of 36,696 authorized meals
- C. Grantee will provide the total number of nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

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

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department

of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, hours of operation are current according to the site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.

- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.
- G. Grantee will provide other reports as requested.
- H. Apart from the on-line reporting via CaGetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

Arata Goto
Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Arata.Goto1@sfgov.org

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

	A	B	C	D	E
1	BUDGET FORMS			Appendix B, pg. 1	Average cost/meal
2	Document Date:			6/10/2016	
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVI				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: Glide Foundation		Grant Term		
6	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification _____		7/1/16 to 6/30/17		
7	Effective Date of Mod:		No. of Mod:		
8	Program:	Cong-ENP		TOTAL	
9	Annual #Meals Contracted	36,696		36,696	
10	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17	
11	DAAS Expenditures				
12	Salaries & Benefits	\$69,204		\$69,204	\$1.89
13	Operating Expense	\$65,572		\$65,572	\$1.79
14	Subtotal	\$134,776		\$134,776	\$3.67
15	Indirect Percentage (max 10%)	10%		10%	
16	Indirect Cost (Line 14 X Line 13)	\$13,478		\$13,478	\$0.37
17	Capital Expenditure				
18	TOTAL DAAS EXPENDITURES	\$148,253		\$148,253	\$4.04
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$153,227		\$153,227	\$4.18
22	Operating Expense	\$33,059		\$33,059	\$0.90
23	Capital Expenditure				
24	TOTAL Non-DAAS EXPENDITURES	\$186,286		\$186,286	\$5.08
25					
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$334,539		\$334,539	\$9.12
27					
28	HSA-DAAS Revenues				
29	Meals	\$148,253		\$148,253	
30					
31					
32					
33					
34	TOTAL HSA-DAAS REVENUES	\$148,253		\$148,253	
35	PER MEAL COST, HSA-DAAS	\$4.04		\$4.04	
36	Non-DAAS Revenues				
37	Project Income				
38	Agency Cash - Fundraising	\$58,249		\$58,249	\$1.59
39	Agency In-Kind Volunteer	\$128,037		\$128,037	\$3.49
40	Nutrition Compliance/Quality Assurance				
41					
42					
43	TOTAL NON HSA-DAAS REVENUES	\$186,286		\$186,286	
44	PER MEAL COST, NON HSA-DAAS	\$5.08		\$5.08	
45	TOTAL REVENUES	\$334,539		\$334,539	
46	PER MEAL COST, TOTAL	\$9.12		\$9.12	
47	Full Time Equivalent (FTE)				
49	Prepared by: Brian Wong	Phone No.:			
50	HSA-CO Review Signature: _____	Date: 6/10/2016			
51	HSA #1 (11/14/13)				

	A	B	C	D	E	F	G	H
1	Grantee's Name: Glide Foundation						Appendix B, page 2	
2	Program Name:						Date: 6/10/16	
3	Cong-ENP							
4								
5	Salaries & Benefits Detail							
6								
7								
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		1/16 to 6/30/17	TOTAL	
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	7/1/16 to 6/30/17	
10	Bruce McKinney, Program Manager	\$70,000	100%	12%	12%	\$8,400	\$8,400	
11	Alexis R Santiago-Cruz, Expeditor	\$30,160	100%	19%	19%	\$5,730	\$5,730	
12	Cho Wing Chung, Cook	\$30,326	100%	18%	18%	\$5,459	\$5,459	
13	James Sampagna, Expeditor	\$31,678	100%	18%	18%	\$5,702	\$5,702	
14	Jonathan Fennell, Cook	\$31,678	100%	18%	18%	\$5,702	\$5,702	
15	Agent	\$41,600	100%	15%	15%	\$6,240	\$6,240	
16	Dishwasher (2)	\$25,480	100%	38%	38%	\$9,682	\$9,682	
17	TBH, Assistant Manager	\$55,000	100%	13%	13%	\$7,150	\$7,150	
18	TOTALS	\$ 315,922	800%	139%	139%	\$54,066	\$54,066	
19								
20	FRINGE BENEFIT RATE	28.00%						
21	EMPLOYEE FRINGE BENEFITS	\$ 88,458				\$15,138	\$15,138	
22								
23								
24	TOTAL DAAS SALARIES & BENEFITS	\$ 404,380				\$69,204	\$69,204	
25								
26								
27	Non - DAAS	Agency Totals		For DAAS Meal			TOTAL	
28	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	7/1/13 to 6/30/16	
29	Program Director	\$ 155,000	100%	5%	5%	\$7,750	\$7,750	
30	Contracts	\$ 47,862	100%	5%	5%	\$2,393	\$2,393	
31	Security Monitor	\$ 30,327	100%	20%	20%	\$6,065	\$6,065	
32	Meals Volunteers	\$ 26,867	1500%	25%	375%	\$100,750	\$100,750	
33	Assistant Manager	\$ 55,000	100%	10%	5%	\$2,750	\$2,750	
34								
35								
36								
37								
38								
39								
40	TOTAL NON-DAAS	\$ 315,056				\$119,709	\$119,709	
41								
42	FRINGE BENEFIT RATE	28%						
43	EMPLOYEE FRINGE BENEFITS	\$ 88,216				\$33,518	\$33,518	
44								
45								
46	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 403,271				\$153,227	\$153,227	
47								
48	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 807,651				\$222,431	\$222,431	

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: Glide Foundation							Appendix B, page 3	
2	Program Name:							Date: 6/10/16	
3	Cong-ENP								
4	Operating Expense Detail								
7	H.S.A-DAAS	Annual #Meals Contracted:			36,696				TOTAL
8	<u>Expenditure Category</u>	Term			<u>7/1/16 to 6/30/17</u>				<u>7/1/16 to 6/30/17</u>
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>	\$ 1.12		\$41,100				\$41,100
15	Cong Food Svc Supplies	<i>per meal</i>	\$ 0.20		\$7,339				\$7,339
16	HDM Food Svc Supplies	<i>per meal</i>							
17	Catered Meals	<i>per meal</i>							
18	CONSULTANT/SUBCONTRACTOR Descriptive Title								
19	Registered Dietitian								
20									
21	OTHER COSTS:								
22	Insurance								
23	Staff Training & Travel								
24	Rental of Equipment								
25	Garbage				\$1,500				\$1,500
26	Information Technology				\$1,000				\$1,000
27	Repair/Maintenance				\$1,300				\$1,300
28	Food Storage				\$978				\$978
29	Occupancy				\$12,355				\$12,355
30	TOTAL DAAS OPERATING EXPENSE				\$65,572				\$65,572
32	Non-DAAS								TOTAL
33	<u>Expenditure Category</u>	Program							
34	Rental of Property								
35	Utilities(Elec, Water, Gas, Phone, Scavenger)								
36	Office Supplies, Postage								
37	Building Maintenance Supplies and Repair								
38	FOOD COSTS								
39	Raw Food	<i>per meal</i>	\$ 0.35		\$12,844				\$12,844
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	CONSULTANT/SUBCONTRACTOR Descriptive Title								
44	Registered Dietitian								
45									
46	OTHER COSTS:								
47	Insurance								
48	Staff Training & Travel								
49	Rental of Equipment								
50	Rental of Equipment								
51	Equipment				\$1,370				\$1,370
52	Garbage				\$1,200				\$1,200
53	Information Technology				\$2,000				\$2,000
54	Occupancy				\$15,645				\$15,645
55									
56	TOTAL Non-DAAS OPERATING EXPENSE				\$33,059				\$33,059
57									
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE				\$98,630				\$98,630

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

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

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
4	150	150	0

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

3	600	600	0
---	-----	-----	---

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

3	250	250	0
---	-----	-----	---

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

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

2	700	700	0
---	-----	-----	---

OTHER Nutrition Compliance:

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

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

4	250	250	0
4			
4			

NOTES:

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

Budget Narrative:

Kathleen da Silva, RD

Registered dietician who performs site monitoring, menu planning & analysis, nutrition compliance, and nutrition education services. Dietician receives a standard rate for services provided.

	A	B	C	D	E
1	Appendix Ba, Page 1				
2	Document Date:				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Glide Foundation			Term	
6				July 1, 2016 to June 30, 2017	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate		REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits				
15	Operating Expense	\$600	\$600		\$600
16	Subtotal Direct	\$600	\$600		\$600
17	Indirect Percentage				
18	Indirect Expense				
19	Total Nutrition Education	\$600	\$600		\$600
20	Nutrition Counseling				
21	Salaries & Benefits				
22	Operating Expense				
23	Subtotal Direct				
24	Indirect Percentage				
25	Indirect Expense				
26	Total Nutrition Counseling				
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits				
29	Operating Expense	\$1,800	\$1,800		
30	Subtotal Direct	\$1,800	\$1,800		\$1,800
31	Indirect Percentage				
32	Indirect Expense				
33	Total HCCP Kitchen Monitoring	\$1,800	\$1,800		\$1,800
34	Site/Route Monitoring				
35	Salaries & Benefits				
36	Operating Expense	\$750	\$750		\$750
37	Subtotal Direct	\$750	\$750		\$750
38	Indirect Percentage				
39	Indirect Expense				
40	Total Site/Route Monitoring	\$750	\$750		\$750
41	Menu Planning				
42	Salaries & Benefits				
43	Operating Expense	\$1,400	\$1,400		\$1,400
44	Subtotal Direct	\$1,400	\$1,400		\$1,400
45	Indirect Percentage				
46	Indirect Expense				
47	Total Menu Planning	\$1,400	\$1,400		\$1,400
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	\$1,000	\$1,000		\$1,000
58	Subtotal Direct	\$1,000	\$1,000		\$1,000
59	Indirect Percentage				
60	Indirect Expense				
61	Total Other Nutrition Compliance	\$1,000	\$1,000		\$1,000
62	GRAND Total Expenditures	\$5,550	\$5,550		\$5,550
63	HSA Revenues				
64	DAAS		\$5,550		\$5,550
65					
66	TOTAL HSA REVENUES		\$5,550		\$5,550
67	Other Non-H.S.A.-DAAS Revenues				
68					
69					
70					
71	TOTAL OTHER REVENUES				
72	Full Time Equivalent (FTE)				
74	Prepared by: Brian Wang	Telephone No.:		Date	
75	HSA-CO Review Signature: _____				
76	HSA #1 5/19/2016				

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

HCCP Kitchen Monitoring Operating Expense Detail

Expenditure Category	TERM	REVENUE Cost Allocation:		TOTAL
		7/1/16-6/30/17	H.S.A.-DAAS	Non-HSA-DAAS
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
Consultant/Kathleen da Silva -		\$1,800	\$1,800	\$1,800
TOTAL OPERATING EXPENSE		\$1,800	\$1,800	\$1,800
HSA #3				5/19/2016

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3											
4	Program Name:										
5	(Same as Line 9 on HSA #1)										
6											
7	Site/Route & Kitchen Monitoring Operating Expense Detail										
8											
9											
10											
11											
12	Expenditure Category			TERM	<u>7/1/16-6/30/17</u>		REVENUE Cost Allocation:				TOTAL
							H.S.A.-DAAS	DAAS			REVENUE
13	Rental of Property										
14	Utilities(Elec, Water, Gas, Phone, Scavenger)										
15	Office Supplies, Postage										
16	Building Maintenance Supplies and Repair										
17	Printing and Reproduction										
18	Insurance										
19	Staff Training										
20	Staff Travel										
21	Small Equipment (over \$500 but under \$5,000/item)										
22	Rental of Equipment										
23											
24	SUBCONTRACTORS Descriptive Title										
25	Consultant/Kathleen da Silva -				\$750		\$750				\$750
26											
27											
28											
29											
30	OTHER										
31											
32											
33											
34											
35											
36											
37	TOTAL OPERATING EXPENSE				<u>\$750</u>		<u>\$750</u>				<u>\$750</u>
38											
39	HSA #3										5/19/2016

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

Menu Planning Operating Expense Detail

Expenditure Category	TERM 7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
OTHER				
Consultant/Kathleen da Silva	\$1,400	\$1,400		\$1,400
TOTAL OPERATING EXPENSE	\$1,400	\$1,400		\$1,400
HSA #3				5/19/2016

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

Other Nutrition Compliance Operating Expense Detail

Expenditure Category	TERM 7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
Consultant/Kathleen da Silva: In-Service Training to Staff	\$1,000	\$1,000		\$1,000
OTHER				
TOTAL OPERATING EXPENSE	\$1,000	\$1,000		\$1,000
HSA #3				5/19/2016

Appendix A - Services to be Provided
Jewish Community Center of San Francisco
Elderly Nutrition Program (ENP) Congregate Meals
July 1, 2016 – June 30, 2017

I. Purpose

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

II. Definitions

Grantee	Jewish Community Center of San Francisco
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Adult and Aging Services
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
HSA	Human Services Agency of the City and County of San Francisco
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the project provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2

meals per day; (c) At least 100% of the DRIs if the project provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

Nutrition Education

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

OOA

Office on the Aging

CA-GetCare

A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.

Low-Income

100% of poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.

Minority

An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

Registered Dietitian (RD)

Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration.

Title 22 Regulations

Refers to Barclay's official California Cod of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program.
http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

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

IV. Eligibility for Services

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

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

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
 2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- C. Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented at least three times a year by a RD. The HACCP monitoring must be

conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist by April 30 of each funding year. The survey tool will be provided by OOA.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use either reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.
<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

VI. Service Objectives

- A. Grantee will serve the total of 850 unduplicated consumers
- B. Grantee will serve the total number of 17,546 authorized meals

VII. Outcome Objectives

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

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; consumer data entry on CA-GetCare; reporting performance

including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, hours of operation are current according to the site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.
- G. Grantee will provide other reports as requested.

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

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

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

	A	B	C	D	E	
1	BUDGET FORMS				Appendix B, pg. 1 Document Date: 6/2/2016 HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES BUDGET PROPOSAL FORMS	
2						
3						
4						
5	JCCSF	Grant Term				
6	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/>					
7	Effective Date of Mod:	No. of Mod:	7/1/16 to 6/30/17			
8	Program: Enter 1 Prog ONLY (e.g. Cong-ENP, HDM-ENP, Cong-YAD, or HDM-YAD)	JCCSF		TOTAL		Average cost/meal
9	Annual #Meals Contracted	17,546		17,546		
10	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17		
11	DAAS Expenditures					
12	Salaries & Benefits	\$61,435		\$61,435	\$3.50	
13	Operating Expense	\$56,365		\$56,365	\$3.21	
14	Subtotal	\$117,800		\$117,800	\$6.71	
15	Indirect Percentage (max 10%)	0%		0%		
16	Indirect Cost (Line 14 X Line 13)	\$0		\$0	\$0.00	
17	Capital Expenditure	\$0		\$0	\$0.00	
18	TOTAL DAAS EXPENDITURES	\$117,800		\$117,800	\$6.71	
19						
20	Non-DAAS Expenditures					
21	Salaries & Benefits	\$70,717		\$70,717	\$4.03	
22	Operating Expense	\$269,643		\$269,643	\$15.37	
23	Capital Expenditure	\$0		\$0	\$0.00	
24	TOTAL Non-DAAS EXPENDITURES	\$340,360		\$340,360	\$19.40	
25						
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$458,160		\$458,160	\$26.11	
27						
28	HSA-DAAS Revenues					
29	Meals	\$117,800		\$117,800		
30						
31						
32						
33						
34	TOTAL HSA-DAAS REVENUES	\$117,800		\$117,800		
35	PER MEAL COST, HSA-DAAS	\$6.71		\$6.71		
36	Non-DAAS Revenues					
37	Project Income	\$31,583		\$31,583	\$1.80	
38	Agency Cash - Fundraising	\$252,203		\$252,203	\$14.37	
39	Agency In-Kind Volunteer	\$56,573		\$56,573	\$3.22	
40	Nutrition Compliance/Quality Assurance					
41						
42						
43	TOTAL NON HSA-DAAS REVENUES	\$340,360		\$340,360		
44	PER MEAL COST, NON HSA-DAAS	\$19.40		\$19.40		
45	TOTAL REVENUES	\$458,160		\$458,160		
46	PER MEAL COST, TOTAL	\$26.11		\$26.11		
47	Full Time Equivalent (FTE)					
48				Date:		
49	Prepared by:			Phone No.:		
50	HSA-CO Review Signature:					
51	HSA #1 (11/14/13)					

	A	B	C	D	E	F	G	H	
1	JCCSF							Appendix B, page 2	
2	Program Name:							Date:	6/2/16
3	JCCSF								
4									
5		Salaries & Benefits Detail							
6									
7									
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		1/16 to 6/30/17	TOTAL		
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	7/1/16 to 6/30/17		
10	Mimi Fried, Older Adult Meal	\$55,037	60%	80%	48%	\$26,418	\$26,418		
11	Effie Cockrell, Food Service	\$40,705	10%	80%	8%	\$3,256	\$3,256		
12	Facilities Staff	\$65,522	50%	50%	25%	\$16,381	\$16,381		
13	Kosher Supervisor (Mashgiach)	\$95,481	18%	18%	3%	\$3,094	\$3,094		
14									
15									
16									
17									
18	TOTALS	\$ 256,745	1.38	1.48	0.36	\$49,148	\$49,148		
19									
20	FRINGE BENEFIT RATE	25.00%							
21	EMPLOYEE FRINGE BENEFITS	\$ 64,186				\$12,287	\$12,287		
22									
23									
24	TOTAL DAAS SALARIES & BENEFITS	\$ 320,931				\$61,435	\$61,435		
25									
26									
27	Non - DAAS	Agency Totals		For DAAS Meal			TOTAL		
28	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary	7/1/13 to 6/30/16		
29	Shiva Schulz, Adult Prg. Mgr.	\$81,443	100%	15%	15%	\$12,216	\$12,216		
30	Cecily Rogers, Admin Ass't	\$46,761	75%	17%	13%	\$5,962	\$5,962		
31	Nutrition Class 31 classes X100	\$3,100	100%	100%	100%	\$3,100	\$3,100		
32	Volunteers	\$35,295	100%	100%	100%	\$35,295	\$35,295		
33									
34									
35									
36									
37									
38	TOTAL NON-DAAS	\$ 166,599	3.75	2.32	2.28	\$56,573	\$56,573		
39									
40	FRINGE BENEFIT RATE	25%							
41	EMPLOYEE FRINGE BENEFITS	\$ 41,650				\$14,143	\$14,143		
42									
43									
44	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 208,249				\$70,717	\$70,717		
45									
46	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 529,180				\$132,152	\$132,152		

	A	B	C	D	E	F	G	H	I
1	JCCSF								Appendix B, page 3
2	Program Name:							Date:	6/2/16
3	JCCSF								
4									
5									
6	H.S.A-DAAS	Annual #Meals Contracted:		17,546					TOTAL
7	<u>Expenditure CategorW</u>	Term:		7/1/16 to 6/30/17					7/1/16 to 6/30/17
8	Rental of Property								
9	Utilities(Elec, Water, Gas, Phone, Scavenger)								
10	Office Supplies, Postage								
11	Building Maintenance Supplies and Repair								
12	FOOD COSTS								
13	Raw Food	<i>per meal</i>							
14	Cong Food Svc Supplie:	<i>per meal</i>							
15	HDM Food Svc Supplie:	<i>per meal</i>							
16	Catered Meals	<i>per meal</i>	\$ 3.19		\$55,965				\$55,965
17	CONSULTANT/SUBCONTRACTOR Descriptive Title								
18	Registered Dietitian								
19									
20	OTHER COSTS:								
21	Insurance								
22	Staff Training & Travel				\$400				\$400
23	Rental of Equipment								
24	Small equipment & Supplies								
25	Auto - Fuel & Insurance								
26	Repair/Maintenance								
27									
28									
29	TOTAL DAAS OPERATING EXPENSE				\$56,365				\$56,365
30									
31	Non-DAAS								TOTAL
32	<u>Expenditure Category</u>	Program							
33	Rental of Property				\$177,000				\$177,000
34	Utilities(Elec, Water, Gas, Phone, Scavenger)								
35	Office Supplies, Postage								
36	Building Maintenance Supplies and Repair								
37	FOOD COSTS								
38	Raw Food	<i>per meal</i>	\$ 0.10		\$1,755				\$1,755
39	Cong Food Svc Supplie:	<i>per meal</i>	\$ 0.10		\$1,755				\$1,755
40	HDM Food Svc Supplie:	<i>per meal</i>							
41	Catered Meals	<i>per meal</i>	\$ 5.08		\$89,134				\$89,134
42	CONSULTANT/SUBCONTRACTOR Descriptive Title								
43	Registered Dietitian								
44									
45	OTHER COSTS:								
46	Insurance								
47	Staff Training & Travel								
48	Rental of Equipment								
49	Rental of Equipment								
50	Small equipment & Supplies								
51	Auto - Fuel & Insurance								
52	Repair/Maintenance								
53									
54									
55	TOTAL Non-DAAS OPERATING EXPENSE				\$269,643				\$92,643
56									
57	TOTAL DAAS & Non-DAAS OPERATING EXPENSE				\$326,008				\$149,008

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

I. Purpose

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

II. Definitions

Grantee	Kimochi, Inc.
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Adult and Aging Services
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
HSA	Human Services Agency of the City and County of San Francisco
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the project provides one meal per day; (b) At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the project provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such

Nutrition Education	<p>snacks cumulatively equal one-third of the DRIs.</p> <p>The service provider dietitian, consulting dietitian or OOA Nutritionist shall approve the nutrition education plans, activities, and materials. The nutrition education for congregate sites is defined as demonstrations, audiovisual presentations, lectures, or small group discussions. Nutrition education services shall be provided by a dietitian or by personnel trained or approved by the dietitian. Dietetic students, interns, or technicians may provide nutrition education under the close supervision of a qualified dietitian. Coordination with community resource is encouraged. Nutrition education services shall be based on the needs of the participants as determined by annual needs assessment and evaluation of service impact. The nutrition education activities shall be provided on quarterly basis and documented. One unit is defined as one nutrition education presentation provided to one participant.</p>
OOA	Office on the Aging
CA-GetCare	<p>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.</p>
Low-Income	<p>100% of poverty level. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.</p>
Minority	<p>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.</p>
Registered Dietitian	<p>Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration.</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.</p>

III. Target Population

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

IV. Eligibility for Services

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

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

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
 2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- C. Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and documented at least three times a year by a R.D. The HACCP monitoring must be conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis.
- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.

- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist by April 30 of each funding year. The survey tool will be provided by OOA.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use either reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.
<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

VI. Service Objectives

- A. Grantee will serve 1237 unduplicated consumers.
- B. Grantee will serve 63,882 authorized meals.
- C. Grantee will provide nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

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

VIII. Monitoring Activities

- A. Nutrition Program Monitoring: Program monitoring will include review of kitchen facility and congregate meal sites in accordance with CRFC and California Department of Aging nutrition standards, project income policies, nutrition education policies, client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, hours of operation are current according to the site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost

allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
 - The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicate that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.
- G. Grantee will provide other reports as requested.
- H. Apart from the on-line reporting via CaGetCare, and reports requested to be sent via e-mail to the Nutritionist and/or Contract Manager, Monthly and Annual Reports will be entered into CARBON system. For assistance with reporting requirements or submission of reports, contact:

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

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

	A	B	C	D	E
1	BUDGET FORMS			Appendix B, pg. 1	Average cost/meal
2				Document Date: 5/24/2016	
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: Kimochi, Inc.		Grant Term		
6			7/1/16 to 6/30/17		
7	Program: Cong-ENP, HDM-ENP, Cong-AWD, HDM-AWD	Cong-ENP NEW		TOTAL	
8	Annual #Meals Contracted	63,882		63,882	
9	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17	
10	DAAS Expenditures				
11	Salaries & Benefits	\$115,151		\$115,151	\$1.80
12	Operating Expense	\$276,060		\$276,060	\$4.32
13	Subtotal	\$391,211		\$391,211	\$6.12
14	Indirect Percentage (%)	9.57%		9.57%	
15	Indirect Cost (Line 14 X Line 13)	\$37,436		\$37,436	\$0.59
16	Capital Expenditure	\$0		\$0	\$0.00
17	TOTAL DAAS EXPENDITURES	\$428,647		\$428,647	\$6.71
18					
19	Non-DAAS Expenditures				
20	Salaries & Benefits	\$88,618		\$88,618	\$1.39
21	Operating Expense	\$89,921		\$89,921	\$1.41
22	Indirect Cost	\$27,025		\$27,025	\$0.42
23	TOTAL Non-DAAS EXPENDITURES	\$205,564		\$205,564	\$3.22
24					
25	EXPENDITURES	\$634,211		\$634,211	\$9.93
26					
27	HSA-DAAS Revenues				
28	Meals	\$428,647		\$428,647	
29					
30	TOTAL HSA-DAAS REVENUES	\$428,647		\$428,647	
31	Per MEAL COST, HSA-DAAS	\$6.71		\$6.71	
32					
33	Non-DAAS Revenues				
34	Project Income	\$121,655		\$121,655	\$1.90
35	Agency In-Kind Volunteer	\$72,170		\$72,170	\$1.13
36	Agency In-Kind Food	\$11,739		\$11,739	\$0.18
37					
38	TOTAL NON HSA-DAAS REVENUES	\$205,564		\$205,564	
39	PER MEAL COST, NON HSA-DAAS	\$ 3.22		\$ 3.22	\$3.22
40	TOTAL REVENUES	\$634,211		\$634,211	
41	PER MEAL COST, TOTAL	\$9.93		\$9.93	
42	Full Time Equivalent (FTE)				
43					
44	Prepared by: Rod Valdepenas	Phone No.: (415) 931-2294	Date: 5/24/16		
45	HSA-CO Review Signature:				
46	HSA #1 (10/20/15)				
47	NOTE: Cells with formulas are protected to avoid accidental changes. To unprotect, go to "Tools" then "Unprotect sheet".				
48	Figures in column B are just examples. Replace these figures with your agency's actual figures in the Salary, Operating & Captial Detail worksheets.				

	A	B	C	D	E	F	G	H
1	Grantee's Name: Kimochi, Inc.					Appendix B, page 2		
2	Program Name:					Date: 5/24/16		
3	Cong-ENP NEW							
4								
5	Salaries & Benefits Detail							
6								
7								
8	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17		TOTAL
9	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/16 to 6/30/17
10	Potwasher 1	\$27,040	75%	62%	46%	\$12,528		\$12,528
11	Senior Center Asst.	\$35,360	100%	35%	35%	\$12,376		\$12,376
12	Senior Center Coordinator	\$43,680	100%	44%	44%	\$19,203		\$19,203
13	Head Cook	\$36,400	75%	62%	46%	\$16,864		\$16,864
14	Asst. Cook 2	\$30,160	75%	62%	46%	\$13,973		\$13,973
15	Asst. Cook 1	\$30,160	75%	62%	46%	\$13,973		\$13,973
16	Nutritionist	\$59,403	50%	26%	13%	\$7,734		\$7,734
17								
18	TOTALS	\$ 262,203	5.50	2.90	2.31	\$96,652		\$96,652
19								
20	FRINGE BENEFIT RATE	19.06%						
21	EMPLOYEE FRINGE BENEFITS	\$ 49,976				\$18,499		\$18,499
22								
23								
24	TOTAL DAAS SALARIES & BENEFITS	\$ 312,179				\$115,151		\$115,151
25								
26								
27	Non - DAAS	Agency Totals		For DAAS Meal				TOTAL
28	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/16 to 6/30/17
29	Nutritionist	\$59,403	50%	3%	2%	\$1,025		\$1,025
30	Agency In-Kind Volunteer	\$27,040	100%	296%	296%	\$80,000		\$80,000
31	Senior Center Assistant	\$35,360	100%	5%	5%	\$1,650		\$1,650
32	Senior Center Coordinator	\$43,680	100%	7%	7%	\$3,245		\$3,245
33								
34	TOTAL NON-DAAS	\$ 165,483	3.50	3.11	3.10	\$85,920		\$85,920
35								
36	FRINGE BENEFIT RATE	3%						
37	EMPLOYEE FRINGE BENEFITS	\$ 5,064				\$2,698		\$2,698
38								
39								
40	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 170,547				\$88,618		\$88,618
41								
42	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 482,726				\$203,770		\$203,770

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: Kimochi, Inc.							Appendix B, page 3	
2	Program Name:							Date: 5/24/2016	
3	Cong-ENP NEW								
4	Operating Expense Detail								
5									
6	H.S.A-DAAS	Annual #Meals Contracted:	63,882						TOTAL
7	<u>Expenditure Category</u>	Term:	7/1/16 to 6/30/17						7/1/16 to 6/30/17
8	Rental of Property		\$70,324						\$70,324
9	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$3,846						\$3,846
10	Office Supplies		\$1,799						\$1,799
11	Postage		\$309						\$309
12	Building Maintenance and Repair		\$3,530						\$3,530
13	FOOD COSTS								
14	Raw Food	per meal \$ 2.57	\$164,483						\$164,483
15	Cong Food Svc Supplies	per meal \$ 0.19	\$12,441						\$12,441
16	HDM Food Svc Supplies	per meal							
17	Catered Meals	per meal							
18	CONSULTANT/SUBCONTRACTOR Descriptive Title								
19	Registered Dietitian								
20									
21	OTHER COSTS:								
22	Insurance		\$6,115						\$6,115
23	Computer/IT/Website		\$700						\$700
24	Dues/Subscriptions		\$80						\$80
25	Outside Services		\$2,550						\$2,550
26	Prof Services - Acctg		\$5,955						\$5,955
27	Printing		\$1,050						\$1,050
28									
29	Telephone		\$2,878						\$2,878
30	TOTAL DAAS OPERATING EXPENSE		\$276,060						\$276,060
31									
32	Non-DAAS								TOTAL
33	<u>Expenditure Category</u>	Program							
34	Rental of Property								
35	Utilities(Elec, Water, Gas, Phone, Scavenger)								
36	Office Supplies, Postage								
37	Building Maintenance Supplies and Repair								
38	FOOD COSTS								
39	Raw Food	per meal \$ 1.19	\$76,072						\$76,072
40	Cong Food Svc Supplies	per meal \$ 0.03	\$2,110						\$2,110
41	HDM Food Svc Supplies	per meal							
42	In Kind Food	per meal \$0.18	\$11,739						\$11,739
43	CONSULTANT/SUBCONTRACTOR Descriptive Title								
44	Registered Dietitian								
45									
46	OTHER COSTS:								
47	Insurance								
48	Staff Training & Travel								
49	Rental of Equipment								
50	Rental of Equipment								
51	Small equipment & Supplies								
52	Auto - Fuel & Insurance								
53	Repair/Maintenance								
54	Prof Services - Acctg								
55									
56	TOTAL Non-DAAS OPERATING EXPENSE		\$89,921						\$89,921
57									
58	TOTAL DAAS & Non-DAAS OPERATING EXPENSE		\$365,981						\$365,981

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

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

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
4.0	100	100	0

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

1.5	600	600	0
-----	-----	-----	---

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

9.0	250	250	0
-----	-----	-----	---

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

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

1.5	700	700	0

OTHER Nutrition Compliance:

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

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

1.0	0	0	0
1.0			

NOTES:

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

Budget Narrative:

	A	B	C	D	E
1	Appendix Ba, Page 1				
2	Document Date:				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Contractor Name			Term	
6	Kimochi, Inc.			July 1, 2016 to June 30, 2017	
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Nutrition Compliance for ENP- Indicate HDM or Congregate	Congregate	REVENUE Cost Allocation:		
10	Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
11	Program Term	7/1/16-6/30/17			
12	Expenditures				
13	Nutrition Education				
14	Salaries & Benefits	\$400	\$400	\$0	\$400
15	Operating Expense	\$0	\$0	\$0	\$0
16	Subtotal Direct	\$400	\$400	\$0	\$400
17	Indirect Percentage				
18	Indirect Expense	\$0	\$0	\$0	\$0
19	Total Nutrition Education	\$400	\$400	\$0	\$400
20	Nutrition Counseling				
21	Salaries & Benefits	\$0	\$0	\$0	\$0
22	Operating Expense	\$0	\$0	\$0	\$0
23	Subtotal Direct	\$0	\$0	\$0	\$0
24	Indirect Percentage				
25	Indirect Expense	\$0	\$0	\$0	\$0
26	Total Nutrition Counseling	\$0	\$0	\$0	\$0
27	HCCP Kitchen Monitoring				
28	Salaries & Benefits	\$900	\$900	\$0	\$900
29	Operating Expense	\$0	\$0	\$0	\$0
30	Subtotal Direct	\$900	\$900	\$0	\$900
31	Indirect Percentage	0.0%			
32	Indirect Expense	\$0	\$0	\$0	\$0
33	Total HCCP Kitchen Monitoring	\$900	\$900	\$0	\$900
34	Site/Route Monitoring				
35	Salaries & Benefits	\$2,250	\$2,250	\$0	\$2,250
36	Operating Expense	\$0	\$0	\$0	\$0
37	Subtotal Direct	\$2,250	\$2,250	\$0	\$2,250
38	Indirect Percentage	0.0%			
39	Indirect Expense	\$0	\$0	\$0	\$0
40	Total Site/Route Monitoring	\$2,250	\$2,250	\$0	\$2,250
41	Menu Planning				
42	Salaries & Benefits	\$1,050	\$1,050	\$0	\$1,050
43	Operating Expense	\$0	\$0	\$0	\$0
44	Subtotal Direct	\$1,050	\$1,050	\$0	\$1,050
45	Indirect Percentage	0.0%			
46	Indirect Expense	\$0	\$0	\$0	\$0
47	Total Menu Planning	\$1,050	\$1,050	\$0	\$1,050
48	HDM Assessments				
49	Salaries & Benefits	\$0	\$0	\$0	\$0
50	Operating Expense	\$0	\$0	\$0	\$0
51	Subtotal Direct	\$0	\$0	\$0	\$0
52	Indirect Percentage	0.0%			
53	Indirect Expense	\$0	\$0	\$0	\$0
54	Total HDM Assessments	\$0	\$0	\$0	\$0
55	Other Nutrition Compliance				
56	Salaries & Benefits	\$0	\$0	\$0	\$0
57	Operating Expense	\$0	\$0	\$0	\$0
58	Subtotal Direct	\$0	\$0	\$0	\$0
59	Indirect Percentage	0.0%			
60	Indirect Expense	\$0	\$0	\$0	\$0
61	Total Other Nutrition Compliance	\$0	\$0	\$0	\$0
62	GRAND Total Expenditures	\$4,600	\$4,600	\$0	\$4,600
63	HSA Revenues				
64	Nutrition Compliance	\$4,600	\$4,600		
65					
66	TOTAL HSA REVENUES	\$4,600	\$4,600		\$4,600
67	Other Non-H.S.A.-DAAS Revenues				
68					
69					
70					
71	TOTAL OTHER REVENUES				
72	Full Time Equivalent (FTE)				
74	Prepared by:	Telephone No.:		Date	
75	HSA-CO Review Signature: _____				
76	HSA #1 6/7/2016				

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

HCCP Kitchen Monitoring Salaries & Benefits Detail

7/1/16-6/30/17

POSITION TITLE	Agency Totals		For HSA Program		For HSA Program	REVENUE Cost Allocation:		Total Revenue
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
Nutritionist	\$59,403	50%	3%	2%	\$900	\$900		\$900
TOTALS	\$59,403	0.50	0.03	0.02	900.00	\$900		\$900
FRINGE BENEFIT RATE	0%							
EMPLOYEE FRINGE BENEFITS	\$0				\$0	\$0		\$0
TOTAL SALARIES & BENEFITS	\$59,403				\$900	\$900		\$900
HSA #2	6/7/2016							

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

I. Purpose

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

II. Definitions

Grantee	On Lok Day Services
CARBON	Human Service Agency's Contracts Administration Reporting and Billing On-line (CARBON) system
CDA	California Department of Aging
Congregate Meals	Congregate meals are provided in a group setting and consist of the procurement, preparation, transporting and serving of meals, as well as nutrition education that meet the needs of the service population.
DAAS	Department of Adult and Aging Services
HACCP	Hazard Analysis of Critical Control Points. A prevention-based food safety system focusing on time and temperature control at different crucial food service system points
HSA	Human Services Agency of the City and County of San Francisco
Menu Analysis	A detailed nutritional analysis approved by a registered dietitian: (a) When utilizing computerized menu analysis, meals shall be analyzed on a weekly basis for a minimum of 2 weeks of the 5-week cycle menu. (b) Each average meal (a weekly average) shall meet no less than one-third of the DRI for males 51+ for all calculated nutrients. (c) At a minimum, values must be determined for calories, protein, fat, fiber, calcium, , zinc, magnesium, sodium, potassium, vitamin A, vitamin C, vitamin D, vitamin E, vitamin B6, and vitamin B12.
Elderly Nutrition Program (ENP) Menu Requirements	Meals shall comply with the current Dietary Guidelines for Americans, published by the U.S. Department of Health and Human Services and the U.S. Department of Agriculture; and shall provide to each participating older individual: (a) A minimum of one-third of the Dietary Reference Intakes (DRIs) as established by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences, if the project provides one meal per day; (b)

At least two-thirds of the DRIs for the provision of 2 meals per day; (c) At least 100% of the DRIs if the project provides 3 meals per day; and (d) Fractions of meals or snacks may not be counted even when such snacks cumulatively equal one-third of the DRIs.

Nutrition Education

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

OOA

Office on the Aging

CA-GetCare

A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.

Low-Income

100% of poverty level. This is only to be used by consumers to self- identify their income status, not to be used as a means test to qualify for the program.

Minority

An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

Registered Dietitian (RD)

Registered Dietitian. An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the

Commission on Dietetic Registration.

Title 22 Regulations

Refers to Barclay's official California Cod of Regulations. Title 22 Social Security, Division 1.8. California Department of Aging. Chapter 4 (1) Title III Programs – program and service provider requirements. Article 5. Title III C- Elderly Nutrition Program. http://www.aging.ca.gov/ProgramsProviders/AAA/Nutrition/Code_of_Regulations/

III. Target Population

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

IV. Eligibility for Services

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

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

V. Services to be Provided

- A. Develop and maintain current agency's nutrition policies and procedures with OOA approval to meet the nutrition and food service standards set forth by California Department of Aging and Office on the Aging that ensure the provision of quality meals, adequate access to socialization activities and sound nutrition information enabling participants to reduce incidences of chronic diseases and maintain independent living.
- B. Provide congregate meal services, which include:
 1. Enroll the number of unduplicated consumers annually as indicated in Table A, and at various locations as indicated in the DAAS-OOA approved Site Chart.
 2. Provide the total number of ENP meals annually as indicated in Table A. The meals will be allocated to each meal site as shown on the DAAS-OOA approved Site Chart. Each meal should meet the CDA and OOA menu requirements.
 3. Provide at least 4 sessions of nutrition education to consumers. The total units of nutrition education will be as shown on the DAAS-OOA approved Site Chart. The service units will be reported on a timely basis on CA-GetCare.
 4. Nutrition screening is conducted annually for each client and documented in CA-GetCare.
 5. The donation rate per meal requested of each client must be approved by the Grantee's Board of Directors and OOA in advance.
- C. Ensure Central kitchen (or caterer kitchen) and all congregate meal sites meet the standards described in the most recent California Retail Food Code (CRFC).
- D. Ensure a Registered Dietitian or an individual with a valid food safety certification oversees the safety and sanitation components of the program. A HACCP safety and sanitation monitoring for the production kitchen must be conducted on site and

documented at least three times a year by a RD. The HACCP monitoring must be conducted on site for each congregate site and documented by a R.D. or food safety certified individual at least three times a year. Follow-up and in-service training shall be provided, as needed, to bring the program into compliance. The HACCP monitoring reports shall be sent to OOA on a timely basis.

- E. Ensure that the cycle menu and a nutrient analysis is approved by a Registered Dietitian and submitted to OOA for review approval in accordance to OOA's nutrition standards. Menu substitutions must be approved by a R.D. and documented.
- F. Conduct consumer satisfaction survey yearly for each funded program and provide results to OOA Nutritionist by April 30 of each funding year. The survey tool will be provided by OOA.
- G. The Grantee will comply with the City's food service waste reduction ordinance (File #06094), and use either reusable, biodegradable, compostable and/or recyclable food service supplies.
- H. Ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program and deliver quality services to meet the needs of the consumers and to meet all the nutrition program standards.
- I. The Grantee will attend the mandatory quarterly in-service training coordinated and provided by the OOA and share the information with their staff and volunteers.
- J. The Grantee will have to be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. The Grantee will complete the California Department of Aging (CDA) Security Awareness Training annually during the term of the grant.
<https://www.aging.ca.gov/docs/Resources/SecurityAwarenessTrng.pps>

VI. Service Objectives

- A. Grantee will serve the total of 2740 unduplicated consumers
- B. Grantee will serve the total number of 81,601 authorized meals
- C. Grantee will provide nutrition compliance units as indicated in Appendix B.

VII. Outcome Objectives

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

VIII. Monitoring Activities

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

reporting, and progress of service and outcome objectives; how participant records are collected and maintained; consumer data entry on CA-GetCare; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards related to nutrition program operation, current organizational chart in the food service department, grievance policies and procedures, hours of operation are current according to the site chart; employee resume and credentials, job description, and whether progress notes are maintained according to the OOA Nutrition standards.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

IX. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form, and the annual Nutrition Risk Screening for all enrolled participants by the due date as specified by OOA and in accordance to OOA Nutrition program guidelines.
- B. Grantee will enter into CA-GetCare all client level service units in the Service Recording Tool and data for client-level service reporting by the 5th working day of the month for the preceding month.
- C. Grantee will provide a monthly report of number of meals served as described in Section VI – Service Objectives. Grantee will enter the following monthly metrics in the CARBON database by the 15th of the following month: Number of meals served and number of nutrition compliance units provided.
- D. Grantee will enter the annual Outcome Objective metrics in the CARBON database by the 15th of the month following the end of the program year.
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of meals they received.
 - The percentage of participants surveyed that have indicated excellent or good in rating the service delivery by staff and/or volunteers.
 - The percentage of participants surveyed who indicated that they benefited from participating in the nutrition program by improving their food security or overall health.
 - The percentage of participants who received nutrition education indicates that they learned to make healthier food choices and/or learn to improve safe food handling practices.
 - The percentage of participants who report increased access to socialization activities and interactions with others.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system. Additional reports may be required at other points in the fiscal year if necessary to meet state requirements.
- F. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the meal program.

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

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

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

	A	B	C	D	E
1	BUDGET FORMS				Appendix B, pg. 1
2	Document Date: 6/3/2016				
3	HUMAN SERVICES AGENCY - DEPARTMENT OF AGING AND ADULT SERVICES				
4	BUDGET PROPOSAL FORMS				
5	Grantee's Name: On Lok Day Services			Grant Term	
6	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification _____				
7	Effective Date of Mod: 7/1/16	No. of Mod:		7/1/16 to 6/30/17	
8	Program: Cong-ENP			TOTAL	Average cost/meal
9	Annual #Meals Contracted	81,601		81,601	
10	Program Term	7/1/16 to 6/30/17		7/1/16 to 6/30/17	
11	DAAS Expenditures				
12	Salaries & Benefits	\$180,262		\$180,262	\$2.21
13	Operating Expense	\$312,694		\$312,694	\$3.83
14	Subtotal	\$492,956		\$492,956	\$6.04
15	Indirect Percentage (max 10%)	9%		9%	
16	Indirect Cost (Line 14 X Line 13)	\$44,367		\$44,367	\$0.54
17	Capital Expenditure	\$0		\$0	\$0.00
18	TOTAL DAAS EXPENDITURES	\$537,323		\$537,324	\$6.58
19					
20	Non-DAAS Expenditures				
21	Salaries & Benefits	\$231,383		\$231,383	\$2.84
22	Operating Expense	\$225,264		\$225,264	\$2.76
23	Capital Expenditure	\$0		\$0	\$0.00
24	TOTAL Non-DAAS EXPENDITURES	\$456,647		\$456,647	\$5.60
25					
26	TOTAL DAAS & Non-DAAS EXPENDITURES	\$993,970		\$993,971	\$12.18
27					
28	HSA-DAAS Revenues				
29	Meals	\$537,323		\$537,323	
30					
31					
32					
33					
34	TOTAL HSA-DAAS REVENUES	\$537,323		\$537,323	
35	PER MEAL COST, HSA-DAAS	\$6.58		\$6.58	
36	Non-DAAS Revenues				
37	Project Income	\$85,681		\$85,681	\$1.05
38	Agency Cash - Fundraising	\$216,838		\$216,838	\$2.66
39	Agency In-Kind Volunteer	\$154,128		\$154,128	\$1.89
40					
41					
42					
43	TOTAL NON HSA-DAAS REVENUES	\$456,647		\$456,647	
44	PER MEAL COST, NON HSA-DAAS	\$5.60		\$5.60	
45	TOTAL REVENUES	\$993,970		\$993,970	
46	PER MEAL COST, TOTAL	\$12.18		\$12.18	
47	Full Time Equivalent (FTE)	7.25		7.25	
49	Prepared by: Valorie Villela - Director (415) 550-2211				
50	HSA-CO Review Signature: _____		Date: _____		
51	HSA #1 (11/14/13)				
52	NOTE: Cells with formulas are protected to avoid accidental changes. To unprotect, go to Toolbar, "Review", select "Unprotect"				

	A	B	C	D	E	F	G	H
1	Grantee's Name: On Lok Day Services						Appendix B, page 2	
2	Program Name:						Date: 6/3/16	
3	Cong-ENP							
4	Salaries & Benefits Detail							
5								
6	H.S.A-DAAS	Agency Totals		For DAAS Nutrition		7/1/16 to 6/30/17		TOTAL
7	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/16 to 6/30/17
8	ACCOUNTANT	\$43,930	100%	0.20	20%	\$8,918		\$8,918
9	ADMINISTRATIVE SECRETARY	\$62,504	100%	8%	8%	\$5,250		\$5,250
10	ASSISTANT DIRECTOR OF OPERATIONS	\$75,005	100%	11%	11%	\$7,876		\$7,876
11	DIRECTOR	\$131,560	100%	8%	8%	\$11,051		\$11,051
12	NUTRITION PROGRAM MANAGER	\$62,400	100%	35%	35%	\$21,735		\$21,735
13	NUTRITION PROGRAM COORDINATOR	\$35,360	100%	32%	32%	\$11,138		\$11,138
14	HOSPITALITY COORDINATOR	\$35,360	100%	16%	16%	\$5,693		\$5,693
15	SITE COORDINATORS (4)	\$28,361	221%	70%	154%	\$43,815		\$43,815
16	DRIVERS (6)	\$27,536	383%	14%	55%	\$15,186		\$15,186
17	VOLUNTEER PROGRAM MANAGER	\$48,422	100%	21%	21%	\$10,168		\$10,169
18								
19								
20								
21	TOTALS	\$ 550,438	14.04	2.35	3.61	\$140,830		\$140,830
22								
23	FRINGE BENEFIT RATE	28.00%						
24	EMPLOYEE FRINGE BENEFITS	\$ 154,122				\$39,432		\$39,432
25								
26								
27	TOTAL DAAS SALARIES & BENEFITS	\$ 704,560				\$180,262		\$180,262
28								
29								
30	Non - DAAS	Agency Totals		For DAAS Meal				TOTAL
31	POSITION TITLE and NAME	Annual Full Time Salary for FTE	Total % FTE (a)	% Nutr Prog (b)	Adjusted Nutr FTE	Budgeted Salary		7/1/16 to 6/30/17
32	ACCOUNTANT	\$ 43,930	100%	9%	9%	\$3,821		\$3,822
33	ADMINISTRATIVE SECRETARY	\$ 62,504	100%	4%	4%	\$2,250		\$2,250
34	ASSISTANT DIRECTOR OF OPERATIONS	\$ 75,005	100%	5%	5%	\$3,375		\$3,375
35	DIRECTOR	\$ 131,560	100%	4%	4%	\$4,736		\$4,736
36	NUTRITION PROGRAM MANAGER	\$ 62,400	100%	15%	15%	\$9,315		\$9,315
37	NUTRITION PROGRAM COORDINATOR	\$ 35,360	100%	14%	14%	\$4,774		\$4,774
38	HOSPITALITY COORDINATOR	\$ 35,360	100%	7%	7%	\$2,440		\$2,440
39	SITE COORDINATORS (4)	\$ 28,361	221%	30%	66%	\$18,778		\$18,778
40	DRIVERS (6)	\$ 27,536	383%	6%	24%	\$6,508		\$6,508
41	VOLUNTEER PROGRAM MANAGER	\$ 48,422	100%	9%	9%	\$4,358		\$4,358
42	IN-KIND VOLUNTEERS (5.7)	\$ 27,040	570%	100%	570%	\$154,128		\$154,128
43								
44								\$0
45	TOTAL NON-DAAS	\$ 577,477	19.74	2.01	7.25	\$214,483		\$214,483
46								
47	FRINGE BENEFIT RATE	79%						
48	EMPLOYEE FRINGE BENEFITS	\$ 456,207				\$16,900		\$16,900
49								
50								
51	TOTAL Non-DAAS SALARIES & BENEFITS	\$ 1,033,684				\$231,383		\$231,383
52								
53	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$ 1,738,244				\$411,645		\$411,645
54	NOTE: Green highlighted cells have formulas that link data to Budget Summary page							

	A	B	C	D	E	F	G	H	I
1	Grantee's Name: On Lok Day Serv							Appendix B, page 3	
2	Program Name:							Date: 6/3/16	
3	Cong-ENP								
4	Operating Expense Detail								
5									
7	H.S.A-DAAS	Annual #Meals Contracted:	81,601						TOTAL
8	Expenditure Category	Term	7/1/16 to 6/30/17						7/1/16 to 6/30/17
9	Rental of Property								
10	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$17,179						\$17,179
11	Office Supplies, Postage								
12	Building Maintenance Supplies and Repair		\$19,973						\$19,973
13	FOOD COSTS								
14	Raw Food	per meal							
15	Cong Food Svc Supplies	per meal							
16	HDM Food Svc Supplies	per meal							
17	Catered Meals	per meal \$ 3.15	\$256,931						\$256,931
18	CONSULTANT/SUBCONTRACTOR Descriptive Title								
19	Dietician Consultant		\$3,517						\$3,517
20	Consultant-Translator								
21	OTHER COSTS:								
22	Insurance		\$9,857						\$9,857
23	Staff Training & Travel								
24	Rental of Equipment								
25	Small equipment & Supplies								
26	Auto - Fuel & Insurance		\$1,473						\$1,473
27	Auto - Repair/Maintenance								
28	Printing								
29	Supplies and Minor Equipment		\$3,764						\$3,764
30	Payroll Processing								
31	Parking - Deliveries								
32	Music Service								
33									
34									
35	TOTAL DAAS OPERATING EXPENSE		\$312,694						\$312,694
37	Non-DAAS								TOTAL
38	Expenditure Category								
39	Rental of Property								
40	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$12,100						\$12,100
41	Office Supplies, Postage		\$475						\$475
42	Building Maintenance Supplies and Repair		\$14,069						\$14,069
43	FOOD COSTS								
44	Raw Food	per meal							
45	Cong Food Svc Supplies	per meal							
46	HDM Food Svc Supplies	per meal							
47	Catered Meals	per meal \$ 2.22	\$180,982						\$180,982
48	CONSULTANT/SUBCONTRACTOR Descriptive Title								
49	Dietician Consultant		\$2,478						\$2,478
50	Consultant-Translator		\$300						\$300
51	OTHER COSTS:								
52	Insurance		\$6,943						\$6,943
53	Staff Training & Travel								
54	Rental of Equipment		\$1,655						\$1,655
55	Small equipment & Supplies								
56	Auto - Fuel & Insurance		\$1,037						\$1,037
57	Auto - Repair/Maintenance		\$248						\$248
58	Printing		\$280						\$280
59	Supplies and Minor Equipment		\$2,652						\$2,652
60	Payroll Processing		\$425						\$425
61	Parking - Deliveries		\$500						\$500
62	Music Service		\$1,120						\$1,120
63									
64									
65									
66	TOTAL Non-DAAS OPERATING EXPENSE		\$225,264						\$225,264
67									
68	TOTAL DAAS & Non-DAAS OPERATING EXPENSE		\$537,958						\$537,958

Nutrition Compliance/Quality Assurance Services:

Cost Per Service Unit:

Proposed Service Units:

Nutrition Education:

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

Year 1	Total Year 1	HSA-DAAS	Non-H.S.A
12	147.15	147.15	0

Nutrition Counseling:

Annual #hours to be provided

Annual #sessions to be provided

HCCP Kitchen Monitoring (1 unit = 1 session completed)

1.5	882.90	882.90	0
18	294.30	294.30	0
1	1162.57	1000.03	162.54

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

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

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

OTHER Nutrition Compliance:

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

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

5	41.86	41.86	-
5	41.86	41.86	-

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:

Congregate

- Nutrition Education: 12 sessions are proposed (4 each at 3 sites) prepared and presented by RD Consultant
- HCCP Kitchen Monitoring: 1.5 units proposed (.5 unit for 3 quarters, DAAS/OOA annual monitoring is used for 4th quarter)
- Site Monitoring: 18 units proposed (6 sites for 3 quarters, DAAS/OOA annual monitoring used for 4th quarter)
- Menu Planning and Analysis: 1 unit proposed for annual congregare portion of program
- In-Service Training: 5 hours proposed for Congregate portion of mandatory meetings

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Contractor Name: On Lok Day Services
 Term: July 1, 2016 to June 30, 2017

(Check One) New Renewal Modification

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

Program: Nutrition Compliance for ENP-Congregate		REVENUE Cost Allocation:		
Budget Reference Page No.(s)	Year 1	H.S.A.-DAAS	Non-HSA-DAAS	Total Revenue
Program Term	7/1/16-6/30/17			
Expenditures				
Nutrition Education				
Salaries & Benefits	\$0	\$0	\$0	\$0
Operating Expense	\$1,620	\$1,620	\$0	\$1,620
Subtotal Direct	\$1,620	\$1,620	\$0	\$1,620
Indirect Percentage	9.0%	9.0%		
Indirect Expense	\$146	\$146	\$0	\$146
Total Nutrition Education	\$1,766	\$1,766	\$0	\$1,766
Nutrition Counseling				
Salaries & Benefits	\$0	\$0	\$0	\$0
Operating Expense	\$0	\$0	\$0	\$0
Subtotal Direct	\$0	\$0	\$0	\$0
Indirect Percentage				
Indirect Expense	\$0	\$0	\$0	\$0
Total Nutrition Counseling	\$0	\$0	\$0	\$0
HCCP Kitchen Monitoring				
Salaries & Benefits	\$0	\$0	\$0	\$0
Operating Expense	\$1,215	\$1,215	\$0	\$0
Subtotal Direct	\$1,215	\$1,215	\$0	\$1,215
Indirect Percentage	9.0%	9.0%		
Indirect Expense	\$109	\$109	\$0	\$109
Total HCCP Kitchen Monitoring	\$1,324	\$1,324	\$0	\$1,324
Site/Route Monitoring				
Salaries & Benefits	\$0	\$0	\$0	\$0
Operating Expense	\$4,860	\$4,860	\$0	\$4,860
Subtotal Direct	\$4,860	\$4,860	\$0	\$4,860
Indirect Percentage	9.0%	9.0%		
Indirect Expense	\$437	\$437	\$0	\$437
Total Site/Route Monitoring	\$5,297	\$5,297	\$0	\$5,297
Menu Planning				
Salaries & Benefits	\$0	\$0	\$0	\$0
Operating Expense	\$1,080	\$917	\$163	\$1,080
Subtotal Direct	\$1,080	\$917	\$163	\$1,080
Indirect Percentage	7.6%	9.0%		
Indirect Expense	\$83	\$83	\$0	\$83
Total Menu Planning	\$1,163	\$1,000	\$163	\$1,163
HDM Assessments				
Salaries & Benefits	\$0	\$0	\$0	\$0
Operating Expense	\$0	\$0	\$0	\$0
Subtotal Direct	\$0	\$0	\$0	\$0
Indirect Percentage				
Indirect Expense	\$0	\$0	\$0	\$0
Total HDM Assessments	\$0	\$0	\$0	\$0
Other Nutrition Compliance				
Salaries & Benefits	\$192	\$192	\$0	\$192
Operating Expense	\$0	\$0	\$0	\$0
Subtotal Direct	\$192	\$192	\$0	\$192
Indirect Percentage	9.0%	9.0%		
Indirect Expense	\$17	\$17	\$0	\$17
Total Other Nutrition Compliance	\$209	\$209	\$0	\$209
GRAND Total Expenditures	\$9,759	\$9,597	\$163	\$9,759
HSA Revenues				
		\$9,597		\$9,597
TOTAL HSA REVENUES		\$9,597		\$9,597
Other Non-H.S.A.-DAAS Revenues				
Agency Cash - Fundraising			\$163	\$163
TOTAL OTHER REVENUES			\$163	\$163
Full Time Equivalent (FTE)	0.03	0.03	0.00	0.03

Prepared by: Valorie Villela - Director Telephone No.: (415) 550-2211 Date: 6/3/16

HSA-CO Review Signature: _____

HSA #1

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

Nutrition Education Operating Expense Detail

12	Expenditure Category	TERM	7/1/16-6/30/17	REVENUE Cost Allocation: H.S.A.-DAAS	DAAS	TOTAL REVENUE
13	Rental of Property					
14	Utilities(Elec, Water, Gas, Phone, Scavenger)					
15	Office Supplies, Postage					
16	Building Maintenance Supplies and Repair					
17	Printing and Reproduction					
18	Insurance					
19	Staff Training					
20	Staff Travel					
21	Small Equipment (over \$500 but under \$5,000/item)					
22	Rental of Equipment					
23						
24	SUBCONTRACTORS Descriptive Title					
25	Registered Dietician		\$1,620	\$1,620		\$1,620
26						
27						
28						
29						
30	OTHER					
31						
32						
33						
34						
35						
36						
37	TOTAL OPERATING EXPENSE		\$1,620	\$1,620		\$1,620
38						
39	HSA #3					

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

HCCP Kitchen Monitoring Operating Expense Detail

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

HSA #3

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

Menu Planning Operating Expense Detail

Expenditure Category	TERM 7/1/16-6/30/17	REVENUE Cost Allocation:		TOTAL
		H.S.A.-DAAS	Non-HSA-DAAS	REVENUE
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel				
Small Equipment (over \$500 but under \$5,000/item)				
Rental of Equipment				
SUBCONTRACTORS Descriptive Title				
Registered Dietician	\$1,080	\$917	\$163	\$1,080
OTHER				
TOTAL OPERATING EXPENSE	\$1,080	\$917	\$163	\$1,080
HSA #3				5/19/2016

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

Other Nutrition Compliance Salaries & Benefits Detail

7/1/16-6/30/17

POSITION TITLE	Agency Totals		For HSA Program		For HSA Program REVENUE Cost Allocation:			Total Revenue
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	H.S.A.-DAAS	Non-HSA-DAAS	
In-Service Training:								
Attend OOA Quarterly Nutrition Meeting:								
NUTRITION PROGRAM MANAGE	\$62,400	100%	0.24%	0.24%	\$150	\$150		\$150
TOTALS	\$62,400	1.00	0.00	0.00	\$150	\$150		\$150
FRINGE BENEFIT RATE	28%							
EMPLOYEE FRINGE BENEFITS	\$17,472				\$42	\$42		\$42
TOTAL SALARIES & BENEFITS	\$79,872				\$192	\$192		\$192
HSA #2								

5/19/2016