



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: JULY 7, 2021

SUBJECT: NEW GRANT: **SELF-HELP FOR THE ELDERLY**
(NON-PROFIT) FOR PROVISION OF CHOOSING
HEALTHY APPETIZING MEAL PLAN SOLUTIONS
FOR SENIORS (CHAMPSS)

DS
EL

GRANT TERM: 7/1/2021 – 6/30/2025

GRANT AMOUNT:

<u>New</u>	<u>Contingency</u>	<u>Total</u>
\$1,615,628	\$161,563	\$1,777,191

ANNUAL AMOUNT

<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>	<u>FY 24/25</u>
\$415,931	\$399,899	\$399,899	\$399,899

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Funding Source:					
FUNDING:	\$1,615,628			\$161,563	\$1,777,191
PERCENTAGE:	100%				100%



London Breed
Mayor

Trent Rhorer
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to enter into a new grant agreement with Self Help for the Elderly for the period of July 1, 2021 to June 30, 2025, in an amount of \$1,615,628 plus a 10% contingency amount for a total amount not to exceed \$1,777,191. The purpose of this grant is to provide congregate nutrition services and congregate meals in a restaurant setting through a program model that utilizes restaurant partnerships.

Background

DAS coordinates and supports a broad array of nutrition services in the City for older adults and adults with disabilities at the community level



SAN FRANCISCO HUMAN SERVICES AGENCY

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

including congregate nutrition services. Nutrition is a major determinant of health and a significant factor in an individual's wellbeing. Congregate nutrition services include the provision of nutritious meals, nutrition education, and nutrition-risk screening and help ensure that older adults and adults with disabilities living in the community have access to affordable and healthy food and meals. Congregate nutrition services also emphasize and promote socialization by providing meals in a group setting and also provide an access point for other home and community-based services.

In 2014, DAS, in partnership with Self Help for the Elderly, launched a program model of congregate nutrition services that provides older adults an option of having a nutritious meal in a restaurant setting with friends, family, and other older adults. This program model, also known as CHAMPSS (Choosing Healthy Appetizing Meal Plan Solutions for Seniors) offers flexible dining times and meal choices at designated partner restaurants in the City. The CHAMPSS program model allows DAS to offer more culturally relevant meal options for clients. The CHAMPSS program model helps DAS to support a client-centered approach in meeting the nutrition needs of older adults and in addressing food insecurity in the older adult populations living in the community.

Services to be Provided

Grantee will provide congregate nutrition services and congregate meals in a restaurant setting through the CHAMPSS program model. Grantee will have at least one designated restaurant in each of the following Supervisorial Districts: District 4, District 7, and District 11. Grantee will ensure the provision of nutritious meals, nutrition education, and nutrition risk screening. The meals provided by the restaurant partners will meet nutritional standards by incorporating the Dietary Guidelines for Americans and provide a minimum of one-third of the Dietary Reference Intakes (DRIs). The meals will be prepared in accordance with nutrition and food service standards set forth by California Retail Food Code (CRFC), Title 22 Regulations, California Department of Aging, and DAS OCP.

For more specific information regarding the services to be provided, please refer to the attached Appendix A.



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

Selection

Grantee was selected through Request for Proposals #943, which was competitively bid on March 25, 2021.

Funding

Funding for this grant is provided by County General Funds.

ATTACHMENTS

Appendix A – Services to be Provided

Appendix B – Program Budget

Appendix F – Site Chart FY21-22

Appendix F1 – Site Chart FY22-25

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

Congregate Nutrition Services for Older Adults
 Choosing Healthy Appetizing Meal Plan Solutions for Seniors (CHAMPSS)

July 1, 2021 – June 30, 2025

I. Purpose

The purpose of this grant is to provide congregate nutrition services for older adults living in the City and County of San Francisco through a program model that offers participants a congregate meal in a restaurant setting through restaurant partnerships. This program model, also known as CHAMPSS, offers participants flexible dining times and multiple meal options, in addition to nutrition education and nutrition risk screening. Similar to the traditional congregate nutrition services model, the CHAMPSS program model supports individuals to live independently in their own homes and communities, helps ensure health and well-being through improved nutrition and reduced isolation, and serves as an access point for other home and community-based services.

II. Definitions

Grantee	Self Help for the Elderly
Adult with a Disability	A person 18-59 years of age living with a disability.
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.
CARBON	Contracts Administration, Reporting, and Billing On-line System.
CCR-Title 22	California Code of Regulations, Title 22, Social Security, Division 1.8. California Department of Aging
CDA	California Department of Aging.
CHAMPSS	Choosing Healthy Appetizing Meal Plan Solutions, a congregate nutrition services model that provides older adults with congregate meals in a restaurant setting through restaurant partnerships.
City	City and County of San Francisco, a municipal corporation.
Congregate Nutrition Services	The procurement, preparation, transporting and serving of meals that meet nutrition requirements to eligible consumers in a group setting. Congregate nutrition services also include nutrition education, health promotion, and nutrition risk screening.

CRFC	California Retail Food Code, which is a uniform statewide health and sanitation standard for food facilities. (Sec. 113700 et seq., California Health and Safety Code)
DAS	Department of Disability and Aging Services.
DETERMINE Your Nutritional Health Checklist / DETERMINE Checklist	A screening tool published by the Nutrition Screening Initiative used to identify individuals at nutritional risk. All grantees must use the DETERMINE Checklist to evaluate the nutrition risk status of congregate and home-delivered meal nutrition services participants. http://www.dhs.gov.vi/home/documents/DetermineNutritionChecklist.pdf
DGA/Dietary Guidelines for Americans	Evidence-based food and beverage recommendations for Americans ages two (2) and older that aim to promote health, prevent chronic disease, and help people reach and maintain a healthy weight. Published jointly every 5 years by the U.S. Department of Health and Human Services (HHS) and the U.S. Department of Agriculture (USDA).
DRI/ Dietary Reference Intakes	Nutrient reference values published by the Institute of Medicine (IOM) that represent the most current scientific knowledge on nutrient needs of healthy populations.
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. (CCR Title 22 Sec. 7630)
ENP	Elderly Nutrition Program - Title III C1 and C2. A program that provides nutrition services, as authorized by the Older Americans Act of 1965, as amended, and is provided in accordance with the provision of CCR Title 22, Chapter 4, Article 5, Sec. 7630.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individuals or others. (CCR Title 22 Sec. 7119)

HACCP	Hazard Analysis of Critical Control Point. A systematic approach to the identification, evaluation, and control of food safety hazards. (CCR Title 22 Sec. 7630)
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low-Income	Having income at or below 100% of the federal poverty line as defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Eligibility for enrollment and/or participation is not means tested. Consumers self-report income status.
Menu Planning and Analysis	The development of a menu cycle that adheres to DAS OCP and CDA menu standards and the nutrition requirements of meals. A Registered Dietitian conducts the menu analysis, and the analysis will demonstrate adherence to the menu standards and nutrition requirements of the meals. (CDA Program Memo 12-17 as amended)
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. (CCR Title 22 Sec. 7130)
NCQA	Nutrition Compliance and Quality Assurance are components of congregate and home-delivered nutrition services that are programmatically required and include, but are not limited to, actions that ensure food safety, certify menu compliance, provide nutrition education, confirm consumer eligibility, and assess consumers’ physiological, socioeconomic, and psychological well-being as well as need for nutrition and other supportive services. NCQA also includes nutrition counseling performed by a registered dietitian, when feasible and appropriate.

Nutrition Counseling	Provision of individualized advice and guidance to individuals who are at nutritional risk because of their health or nutritional history, dietary intake, medications use, or chronic illnesses about options and methods for improving their nutritional status, performed by a registered dietitian in accordance with Sections 2585 and 2586, Business and Professions Code. (CCR Title 22 Sec. 7630)
Nutrition Education	Informing recipients of congregate and home-delivered meals about current nutrition facts and information, which will promote improved food selection, eating habits, nutrition, health promotion, and disease prevention practices. (CCR Title 22 Sec. 7630 & 7638.11)
Nutrition Requirements of Meals	Each meal provided through congregate and home-delivered nutrition services shall adhere to the current Dietary Guidelines for Americans (DGA) and provide a minimum of one-third of the Dietary Reference Intakes (DRI). (CCR Title 22 Sec. 7638.5)
Nutrition Screening	Completion of a nutrition screening checklist by eligible individuals to determine if they are at nutrition risk. A nutrition screening checklist is a federal public information collection requirement in the National Aging Program Information System (NAPIS), found in the Federal Register, Volume 59, No. 188, September 29, 1994. (CCR Title 22 Sec. 7630)
Nutrition Services	The procurement, preparation, transport, and service of meals, nutrition education, nutrition screening, and nutrition counseling, to eligible individuals at congregate sites or in their homes. (CCR Title 22 Sec. 7630)
OCP	Office of Community Partnerships.
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	A person who is 60 years of age or older, used interchangeably with the term “senior”.
Registered Dietitian (RD) Registered Dietitian Nutritionist (RDN)	Registered Dietitian or Registered Dietitian Nutritionist: An individual who shall be both: 1) Qualified as specified in Sections 2585 and 2586, Business and Professions Code, and 2) Registered by the Commission on Dietetic Registration.

Senior	A person who is 60 years of age or older; used interchangeably with the term “older adult”.
SF-HSA	Human Services Agency of the City and County of San Francisco.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9</i>).
Unduplicated Consumer (UDC)	An individual who participates in congregate nutrition services and the grantee reflects consumer participation in CA-GetCare through enrollment.

III. Target Population

The target population is older adults living in the City and County of San Francisco with the greatest economic and social need and with particular attention to the following individuals:

1. Low income
2. Limited or no English speaking proficiency
3. Minority populations
4. Frail
5. LGBTQ+

IV. Eligibility for Services

1. A person who is 60 years of age or older (older adult).
2. The spouse or domestic partner of an older adult, regardless of age.
3. A person with a disability, under the age of sixty (60) who resides in housing facilities occupied primarily by older adults at which congregate nutrition services are provided.
4. A disabled individual who resides at home with and accompanies an older adult who participates in the program.

V. Location and Time of Services

The grantee will provide a CHAMPSS congregate nutrition services program in the following three supervisorial districts in the City and County of San Francisco:

1. Supervisorial District 4
2. Supervisorial District 7

3. Supervisorial District 11

Each district will have a minimum of one designated restaurant location. The grantee, with approval from DAS OCP, will determine the location(s) and time(s) for the provision of congregate nutrition services.

VI. Description of Services and Program Requirements

1. Grantee will recruit at least one restaurant in each of the identified supervisorial districts in the City and County of San Francisco to be a CHAMPSS congregate meal site, establish subcontracting agreements with the restaurant, and manage all aspects of the partnership.
2. Grantee will coordinate all operational aspects of onboarding a restaurant as a congregate meal site including but not limited to establishing nutrition policies and procedures that are in compliance with and meet the nutrition and food service standards set forth by California Retail Food Code (CRFC). The grantee will ensure the provision of congregate nutrition services through restaurant partnerships comply with CCR Title 22, CDA, and DAS OCP.
3. Grantee through the restaurant partnerships will provide congregate nutrition services for older adults. The provision of services will include the following:
 - i. Enrollment of consumers in the program and the provision of congregate meals to those consumers as indicated in Table A below and in the various neighborhoods and/or districts as indicated in the DAS OCP approved site chart.
 - ii. Provision of congregate meals that meet nutritional standards by adhering to the current DGA and offering a minimum of one-third of the DRIs if the grantee provides one meal per day. If the grantee provides two meals per day, the meals must contain at least two-thirds of the DRIs. If the grantee provides three meals per day, the meals must contain 100% of the DRIs. The grantee may not count fractions of meals or snacks cumulatively. Each meal must individually meet one-third of the DRIs.
 - iii. Annual nutrition screenings for each consumer and documentation of individual responses in CA-GetCare within one month of obtaining them. Required screenings include a nutritional risk screening using the DETERMINE Checklist and a food security screening. The grantee will refer clients screened at high nutritional risk to the DAS funded citywide nutrition counseling and education program.
4. Grantee will inform consumers about the suggested voluntary contribution for a meal and a guest fee for individuals who are not eligible to enroll as a consumer in congregate nutrition services. The grantee's board of directors must approve the suggested contribution and guest fee per meal. The grantee will ensure its policy and procedures for the suggested meal contribution and guest fee comply with DAS OCP policy memoranda.
5. Grantee will conduct Nutrition Compliance-Quality Assurance (NCQA) as follows:
 - i. Submit for review and approval by DAS OCP, at least one month in advance of use, a menu with the required corresponding menu analysis. The registered dietitian (RD) on staff or consultant RD must participate in menu planning

- and complete the corresponding nutrient analysis. The menu should provide multiple options for consumers to choose from and be inclusive of the restaurant's regular menu offerings. The grantee will ensure that the menu options offer culturally relevant meals for the consumers served in each of the supervisorial districts.
- ii. Document menu substitutions. The RD on staff or consultant RD must review and approve menu substitutions in advance of their use.
 - iii. Provide nutrition education to consumers enrolled and participating in services at least quarterly. The total units of nutrition education will be, at minimum, as shown on the DAS OCP approved site chart. The grantee will report in CA-GetCare the number of nutrition education units provided in the applicable month. One unit of nutrition education is one consumer receiving nutritional education.
 - iv. Conduct and document an on-site HACCP safety and sanitation monitoring of each restaurant production kitchen at least once per quarter and a minimum of four times during the fiscal year. The RD on staff or consultant RD must conduct and document the results of the HACCP safety and sanitation monitoring. HACCP monitoring must also include, but is not limited to the review of quarterly site monitoring reports.
 - v. Conduct and document an on-site HACCP safety and sanitation monitoring of each restaurant meal site at least once per quarter and a minimum of four times during the fiscal year. The RD on staff, consultant RD, or a qualified staff member must conduct and document the results of the HACCP safety and sanitation monitoring for each site.
 - vi. Provide orientation and training to all new staff, paid and volunteers, to perform their assigned responsibilities and tasks as described in the CCR Title 22 Regulations Sec. 7636.5. Training, at a minimum, shall include:
 - (1) Food safety, prevention of foodborne illness, and HACCP principles.
 - (2) Accident prevention, instruction on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
 - vii. Provide a minimum of four (4) hours annually of in-service trainings for nutrition program staff (e.g. food service and delivery workers) as described in the CCR-Title 22 Regulations Sec. 7636.5 and DAS OCP policy memoranda. The grantee will also document, schedule, and conduct in-service trainings in a timely manner when there are monitoring findings. A registered dietitian (RD) must review and approve an annual in-service training plan and the training curriculum for nutrition program staff.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At minimum, the completed number of surveys per meal site shall be a sample size of the average number of meals served daily.
 7. Grantee will have a qualified manager on staff who conducts the day-to-day management and administrative functions of the nutrition program. The grantee will ensure the manager on staff possess a food safety manager certification and has the required qualifications as described in the CCR Title 22 Regulations Sec. 7636.3 and DAS OCP policy memoranda.

8. Grantee will ensure there is a sufficient number of qualified staff, paid and volunteer, with the appropriate education, experience, and cultural competency to carry out the requirements of the program and deliver quality services to meet the needs of the consumers.
9. Grantee will attend in-service trainings and nutrition meetings coordinated and provided by DAS OCP, and share the information with their staff and volunteers as needed.
10. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

1. Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A	FY 21/22	FY 22/23	FY 23/24	FY 24/25
Number of Unduplicated Consumers (UDC)	1,151	1,151	1,151	1,151
Number of Meals	42,400	40,806	40,806	40,806

VIII. Outcome Objectives

1. Consumers report increased consumption of fruits, vegetables, and/or whole grains. Target: 75%.
2. Consumers feel less worried about getting enough food to meet their needs. Target: 85%.
3. Consumers rate the quality of meals they received as excellent or good. Target: 85%.
4. Consumers feel a greater sense of connection to their community. Target: 85%.
5. Consumers feel safe and welcomed by program staff. Target: 85%.

Based on a consumer survey and a sample size equal to or greater than the average number of daily meals served by the grantee.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAS OCP approved congregate intake form, which includes the annual nutrition risk screening, and the food security screening into the CA-GetCare database in accordance to DAS OCP policy memorandum.

2. Grantee will enter into the CA-GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number of meals prepared and served
 - Number nutrition compliance units provided
4. Grantee will submit HACCP monitoring reports of the production kitchen and congregate sites to DAS OCP once per quarter. Quarterly reports due Oct. 15; Jan. 15; April 15; and June 15.
5. Grantee will enter the annual outcome objective metrics identified in Section VIII of the Appendix A in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to SF-HSA no later than July 31 each grant year. The grantee must submit the report in the CARBON system.
7. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
10. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. Grantee will assure that services delivered are consistent with professional standards for this service.
13. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
14. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Points		
Name	Address	Phone
Western Addition Senior Center	1390 1/2 Turk St, San Francisco, 94115	415-921-7805
Bayview Senior Connections	5600 3rd St, San Francisco, 94124	415-647-5353
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132	415-335-5558
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121	415-404-2938
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131	415-550-2221
Openhouse	1800 Market St, San Francisco, 94102	415-347-8509
SF Senior Center (SFSC)	481 O'Farrell St, San Francisco, 94102	415-202-2983
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109	415-202-2983
South Sunset Senior Center (SHE)	2601 40th Ave , San Francisco, 94116	415-566-2845
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133	415-677-7585
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108	415-438-9804
Toolworks	25 Kearny St, San Francisco, 94108	415-733-0990
DAS Benefits and Resources Hub	2 Gough St, San Francisco, 94103	415-355-6700

15. For assistance with reporting and contract requirements, please contact:

Tiffany Kearney, RD
Lead Nutritionist
DAS OCP
Tiffany.Kearney@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
Tahir.Shaikh@sfgov.org

X. Monitoring Activities

1. Nutrition Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; 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; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all DAS OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of

consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name

SELF-HELP FOR THE ELDERLY

(Check One) New Renewal Modification

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

Program: CHAMPSS

Budget Reference Page No.(s)					
Program Term	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Annual # Meals Contracted	42,400	40,806	40,806	40,806	164,818
DAS Expenditures					
Salaries & Benefits	\$164,928	\$158,711	\$158,711	\$158,711	\$641,061
Operating Expenses	\$198,556	\$191,107	\$191,107	\$191,107	\$771,877
Subtotal	\$363,484	\$349,818	\$349,818	\$349,818	\$1,412,938
Indirect Percentage (%)	10%	10%	10%	10%	10%
Indirect Cost	\$36,348	\$34,982	\$34,982	\$34,982	\$141,294
Capital/Subcontractor Expenditures	\$1,000				\$1,000
NCQA Expenditures	\$15,099	\$15,099	\$15,099	\$15,099	\$60,396
Total DAS Expenditures	\$415,931	\$399,899	\$399,899	\$399,899	\$1,615,628
Non DAS Expenditures					
Salaries & Benefits	\$41,275	\$41,275	\$41,275	\$41,275	\$165,100
Operating Expenses	\$177,205	\$171,387	\$171,387	\$171,387	\$691,366
Capital/Subcontractor Expenditures					
NCQA Expenditures					
Total Non DAS Expenditures	\$218,480	\$212,662	\$212,662	\$212,662	\$856,466
TOTAL DAS AND NON DAS EXPEDITURES	\$634,411	\$612,561	\$612,561	\$612,561	\$2,472,094
DAS Revenues					
Meals- General Fund	\$399,832	\$384,800	\$384,800	\$384,800	\$1,554,232
OTO	\$1,000				\$1,000
NCQA Fund	\$15,099	\$15,099	\$15,099	\$15,099	\$60,396
Total DAS Revenue	\$415,931	\$399,899	\$399,899	\$399,899	\$1,615,628
PER MEAL COST, DAS	\$9.45	\$9.43	\$9.43	\$9.43	\$9.44
PER MEAL COST (with NCQA), DAS	\$9.81	\$9.80	\$9.80	\$9.80	\$9.80
Non DAS Revenues					
Project Income	\$169,600	\$163,224	\$163,224	\$163,224	\$659,272
Agency Cash- Fundraising	\$48,880	\$49,438	\$49,438	\$49,438	\$197,194
Agency In-kind Volunteer					
NCQA Revenue					
Total Non DAS Revenue	\$218,480	\$212,662	\$212,662	\$212,662	\$856,466
PER MEAL COST, Non DAS	\$5.15	\$5	\$5	\$5	\$5
PER MEAL COST (with NCQA), Non DAS	\$5	\$5	\$5	\$5	\$5
TOTAL DAS AND NON DAS REVENUE	\$634,411	\$612,561	\$612,561	\$612,561	\$2,472,094
PER MEAL COST, Total	\$15	\$15	\$15	\$15	\$15
PER MEAL COST (with NCQA), Total	\$15	\$15	\$15	\$15	\$15
Full Time Equivalent (FTE)	7.00	7.00	7.00	7.00	28.00

Prepared by:

Date: 6/4/2021

HSA-CO Review Signature: _____

HSA #1

10/25/2016

Program: CHAMPSS
(Same as Line 11 on HSA #1)

Document Date: 6/4/2021

Operating Expense Detail

	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Annual # Meals Contracted	42,400	40,806	40,806	40,806	164,818
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities (Elec, Water, Gas, Phone, Garbage)	\$500	\$500	\$500	\$500	\$2,000
Office Supplies, Postage	\$185	\$148	\$148	\$148	\$629
Building Maintenance Supplies and Repair	\$111	\$111	\$111	\$111	\$444
Printing and Reproduction					
Insurance	\$600	\$600	\$600	\$600	\$2,400
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
<u>Food Cost</u>					
Raw Food <i>per meal</i>					
Cong Food Svc Supplies <i>per meal</i>					
Catered Meals <i>per meal \$4.65</i>	\$197,160	\$189,748	\$189,748	\$189,748	\$766,404
<u>Consultant</u>					
Consultant A					
<u>Other</u>					
Total DAS Operating Expenses	\$198,556	\$191,107	\$191,107	\$191,107	\$771,877
Non DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
Utilities (Elec, Water, Gas, Phone, Garbage)	\$500	\$500	\$500	\$500	\$2,000
Office Supplies, Postage	\$250	\$250	\$250	\$250	\$1,000
Building Maintenance Supplies and Repair	\$500	\$500	\$500	\$500	\$2,000
Printing and Reproduction					
Insurance	\$1,295	\$1,295	\$1,295	\$1,295	\$5,180
Staff Training	\$500	\$500	\$500	\$500	\$2,000
Staff Travel-(Local & Out of Town)	\$1,400	\$1,400	\$1,400	\$1,400	\$5,600
Rental of Equipment					
<u>Food Cost</u>					
Raw Food <i>per meal</i>					
Cong Food Svc Supplies <i>per meal</i>					
Catered Meals <i>per meal \$3.65</i>	\$154,760	\$148,942	\$148,942	\$148,942	\$601,586

<u>Consultant</u>					
Consultant A					
<u>Other</u>					
Software/Database	\$4,000	\$4,000	\$4,000	\$4,000	\$16,000
Finance Charges	\$4,000	\$4,000	\$4,000	\$4,000	\$16,000
Total Non DAS Operating Expenses	\$177,205	\$171,387	\$171,387	\$171,387	\$691,366
Total DAS and Non DAS Operating Expenses	\$375,761	\$362,494	\$362,494	\$362,494	\$1,463,243
HSA #3					10/25/2016

Program: CHAMPSS
 (Same as Line 11 on HSA #1)

Appendix B, Page 4
 Document Date: 6/4/2021

Capital & Subcontractor Expenditure Detail

DAS Capital Expenditure

<u>Equipment (Qty)</u>	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
CHAMPSS Cards 6,000 pcs	\$1,000				\$1,000
Total Equipment Cost	\$1,000				\$1,000
<u>Remodeling</u>	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Total Remodeling Cost					
<u>Subcontractor</u>	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Total Subcontractor Cost					
Total DAS Capital & Subcontractor Expenditure	\$1,000				\$1,000

Non DAS Capital Expenditure

<u>Equipment (Qty)</u>	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Total Equipment Cost					
<u>Remodeling</u>	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Total Remodeling Cost					
<u>Subcontractor</u>	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Total Subcontractor Cost					
Total Non DAS Capital & Subcontractor Expenditure					

Total DAS and Non DAS Capital & Subcontractor Expenditure	\$1,000				\$1,000
--	----------------	--	--	--	----------------

HSA #4 **10/25/2016**

Program: CHAMPSS
 (Same as Line 11 on HSA #1)

Appendix B, Page 5
 Document Date: 6/4/2021

NCQA Expenditure Detail

DAS NCQA Expenditure	Unit price	Unit	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Menu planning and nutrition analysis	\$773.00 /set	3.00	\$2,319	\$2,319	\$2,319	\$2,319	\$9,276
Kitchen and food service monitoring	\$630.00	12.00	\$7,560	\$7,560	\$7,560	\$7,560	\$30,240
Congregate site monitoring							
Nutrition education	\$335.00	12.00	\$4,020	\$4,020	\$4,020	\$4,020	\$16,080
In-service training	\$100.00 /training	12.00	\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Total DAS NCQA Expenditure			\$15,099	\$15,099	\$15,099	\$15,099	\$60,396

Non DAS NCQA Expenditure	Unit price	Unit	FY 21/22	FY 22/23	FY 23/24	FY 24/25	Total
Menu planning and nutrition analysis	/set	3.00					
Kitchen and food service monitoring		12.00					
Congregate site monitoring							
Nutrition education		12.00					
In-service training	/training	12.00					
Total Non DAS NCQA Expenditure							

Total DAS and Non DAS NCQA Expenditure			\$15,099	\$15,099	\$15,099	\$15,099	\$60,396
---	--	--	-----------------	-----------------	-----------------	-----------------	-----------------

HSA #4

10/25/2016

ANNUAL SITE CHART - CHAMPSS				OFFICE OF COMMUNITY PARTNERSHIPS				
Appendix F								
AGENCY: Self-Help for the Elderly								
MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA 94303								
DIRECTOR: Alex Tan			EMAIL: Alex@selfhelpelderly.org			PHONE NO.: 415-677-7602		
PROGRAM MANAGER: Tiffany Wong			EMAIL: tiffanyw@selfhelpelderly.org			PHONE NO.: 415-677-7603		
Congregate Program Type CHAMPSS	CHAMPSS	CHAMPSS	CHAMPSS					Total ALL Sites
Name of Site/Restaurant	S&E Cafe	PhoSure	Henry's Hunan					
Address and Zip	2406 - 19th Ave. SF, CA 94116	1240 Noriega Street SF, CA 94122	4753 Mission St S.F. CA 94112					
Phone Number	(415) 665-7868	415-564-8818	(415)585-8838					
Alternate Phone Number								
Neighborhood	Sunset	Sunset	Excelsior					
Supervisorial District No.	7	4	11					
Bus Line #	28, 28L, and L routes	28, 28R, 91, 7, 7R, 7X	14, 14R, 29					
Site Manager/Coordinator	Shelaine Huang	Shelaine Huang	Shelaine Huang					
Site Hours Open	11:00am - 8:00pm	11:00am - 8:00pm	11:00am - 8:00pm					
Days Open for Meal Service	x Mon Tues x Wed x Thurs x Fri x Sat x Sun	Mon x Tues x Wed x Thurs x Fri x Sat x Sun	x Mon Tues x Wed x Thurs x Fri x Sat x Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun
Hours of Meal Service	11:00am - 8:00pm	11:00am - 8:00pm	11:00am - 8:00pm					
Type of Meal (hot, cold)	hot	hot	hot					
Vegetarian meal option available	x Yes No	x Yes No	x Yes No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No
Cuisine Type (American, American-Latinx, Chinese, Japanese, Kosher, Russian, etc.)	American, Chinese	Vietnamese, Chinese	American, Chinese					
# Unduplicated Consumers	713	288	150					1,151
Number of Meals	26,288	10,600	5,512					42,400
# Service Days	312	312	312					
Average # meals per day	84	34	18					136
# Nutrition Education Units 1 unit = #consumer x #sessions	337	136	71					544
Days Closed (list holidays closed)	Thanksgiving Day, Christmas Day	Chinese New Year, Christmas Day	Thanksgiving Day, Christmas Day					
ADA Accessible	x Yes No	x Yes No	x Yes No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No

ANNUAL SITE CHART - CHAMPSS				OFFICE OF COMMUNITY PARTNERSHIPS				
Appendix F1								
AGENCY: Self-Help for the Elderly								
MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA 94303								
DIRECTOR: Alex Tan			EMAIL: Alex@selfhelpelderly.org			PHONE NO.: 415-677-7602		
PROGRAM MANAGER: Tiffany Wong			EMAIL: tiffanyw@selfhelpelderly.org			PHONE NO.: 415-677-7603		
Congregate Program Type CHAMPSS	CHAMPSS	CHAMPSS	CHAMPSS					Total ALL Sites
Name of Site/Restaurant	S&E Cafe	PhoSure	Henry's Hunan					
Address and Zip	2406 - 19th Ave. SF, CA 94116	1240 Noriega Street SF, CA 94122	4753 Mission St S.F. CA 94112					
Phone Number	(415) 665-7868	415-564-8818	(415)585-8838					
Alternate Phone Number								
Neighborhood	Sunset	Sunset	Excelsior					
Supervisorial District No.	7	4	11					
Bus Line #	28, 28L, and L routes	28, 28R, 91, 7, 7R, 7X	14, 14R, 29					
Site Manager/Coordinator	Shelaine Huang	Shelaine Huang	Shelaine Huang					
Site Hours Open	11:00am - 8:00pm	11:00am - 8:00pm	11:00am - 8:00pm					
Days Open for Meal Service	x Mon Tues x Wed x Thurs x Fri x Sat x Sun	Mon x Tues x Wed x Thurs x Fri x Sat x Sun	x Mon Tues x Wed x Thurs x Fri x Sat x Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat ___ Sun
Hours of Meal Service	11:00am - 8:00pm	11:00am - 8:00pm	11:00am - 8:00pm					
Type of Meal (hot, cold)	hot	hot	hot					
Vegetarian meal option available	x Yes No	x Yes No	x Yes No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No
Cuisine Type (American, American-Latinx, Chinese, Japanese, Kosher, Russian, etc.)	American, Chinese	Vietnamese, Chinese	American, Chinese					
# Unduplicated Consumers	713	288	150					1,151
Number of Meals	24,483	14,282	2,041					40,806
# Service Days	312	312	312					
Average # meals per day	78	34	18					130
# Nutrition Education Units 1 unit = #consumer x #sessions	314	136	71					521
Days Closed (list holidays closed)	Thanksgiving Day, Christmas Day	Chinese New Year, Christmas Day	Thanksgiving Day, Christmas Day					
ADA Accessible	x Yes No	x Yes No	x Yes No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No