

File No. 250579

Committee Item No. 12

Board Item No. 35

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee Date July 23, 2025

Board of Supervisors Meeting Date July 29, 2025

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Completed by: Brent Jalipa Date July 17, 2025

Completed by: Brent Jalipa Date July 24, 2025

1 [Grant Agreement - Self-Help for the Elderly - Congregate Nutrition Services for Older Adults -
2 Not to Exceed \$11,125,299]

3 **Resolution approving a Grant Agreement between the City, acting by and through the**
4 **Department of Disability and Aging Services, and Self-Help for the Elderly for the**
5 **provision of Congregate Nutrition Services for Older Adults Program, for a term of four**
6 **years from July 1, 2025, through June 30, 2029, and for a total not to exceed amount of**
7 **\$11,125,299; and to authorize the Executive Director of the Department of Disability and**
8 **Aging Services to enter into amendments or modifications to the Grant Agreement that**
9 **do not materially increase the obligations or liabilities to the City and are necessary to**
10 **effectuate the purposes of the Grant Agreement or this Resolution.**

11
12 WHEREAS, The City and County of San Francisco, by and through its Department of
13 Disability and Aging Services, wishes to provide the Congregate Nutrition Services for Older
14 Adults program to reduce hunger, food insecurity, and malnutrition of older adults living in the
15 community as well as support their safety and independence; and

16 WHEREAS, On December 31, 2024, the Department of Disability and Aging Services,
17 in coordination with the Human Services Agency, issued a Request for Proposals #1177 for
18 Congregate Nutrition Services; and

19 WHEREAS, Self-Help for the Elderly submitted a proposal and was awarded the grant
20 for the total amount of \$10,113,908 for the period of July 1, 2025, through June 30, 2029; and

21 WHEREAS, On May 7, 2025, the Department of Disability and Aging Services
22 Commission approved the proposed Congregate Nutrition for Older Adults grant with Self-
23 Help for the Elderly (the "Grant Agreement") in a total amount not to exceed \$11,125,299 for
24 the period from July 1, 2025, through June 30, 2029; and

1 WHEREAS, The City and County of San Francisco, by and through its Department of
2 Disability and Aging Services, now wishes to enter into the Grant Agreement with Self-Help
3 for the Elderly; and

4 WHEREAS, Charter, Section 9.118(b) requires Board of Supervisors' approval by
5 Resolution of any contract which, when entered into, extends over 10 years, and of any
6 contract which, when entered into, costs the City \$10,000,000 or more; and

7 WHEREAS, The proposed Grant Agreement contained in File No. 250579, is
8 substantially in final form, with all material terms and conditions included, and only remains to
9 be executed by the parties upon approval of this Resolution; now, therefore, be it

10 RESOLVED, That the Board of Supervisors hereby approves the Grant Agreement in
11 substantially the form contained in File No. 250579; and, be it

12 FURTHER RESOLVED, That the Board of Supervisors authorizes the Department of
13 Disability and Aging Services to make any modifications to the Grant Agreement, prior to its
14 final execution by all parties, that the Department of Disability and Aging Services determines,
15 in consultation with the City Attorney, are consistent with this Resolution, in the best interest of
16 the City, do not materially increase the obligations or liabilities of the City, are necessary or
17 advisable to effectuate the purposes of the Grant Agreement, and are in compliance with all
18 applicable laws, including City's Charter; and, be it

19 FURTHER RESOLVED, That within 30 days of the Grant Agreement being fully
20 executed by all parties, the Department of Disability and Aging Services shall submit to the
21 Clerk of the Board of Supervisors a completely executed copy for inclusion in File No. 250579;
22 this requirement and obligation resides with the Department, and is for purposes of having a
23 complete file only, and in no manner affects the validity of the approved Grant Agreement.

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Approved:

 /S/

Kelly Dearman

Executive Director

Department of Disability and Aging Services

Item 12 File 25-0579	Department: Human Services Agency
EXECUTIVE SUMMARY	
Legislative Objectives - The proposed resolution would approve a new grant agreement between the Department of Disability and Aging Services and Self-Help for the Elderly for congregate nutrition services for older adults for a four-year term from July 1, 2025 to June 30, 2029 and a total not to exceed amount of \$11,125,299. Key Points - Under the proposed agreement, Self-Help will provide congregate meals and other nutrition services to older adults and people with disabilities. - Across DAS nutrition programs, the cost of food is increasing by more than local, state, and federal funding, resulting in a decline in the projected number of meals provided to older adults and adults with disabilities in FY 2025-26. The proposed new agreement with Self-Help for the Elderly reflects a 61 percent reduction in meals and a 30 percent reduction in clients annually compared to FY 2023-24 levels under the existing agreement. According to DAS staff, clients may be turned away from congregate meals sites due to the reduction in meals. Fiscal Impact - The not to exceed amount of \$11.1 million reflects a \$2.5 million annual budget over the four-year term and a 10 percent contingency. The annual budget of \$2.5 million is largely funded by the General Fund. In addition, Self-Help for the Elderly anticipates that it will provide approximately \$0.8 million in annual program funding through fundraising, project income, and in-kind volunteering. - The total cost per meal is \$18.46. City funding provides \$14.05 per meal (76 percent), and Self-Help funding and in-kind volunteering is subsidizing costs by \$4.41 per meal. Recommendation - Approve the proposed resolution.	

MANDATE STATEMENT

City Charter Section 9.118(b) states that any contract entered into by a department, board or commission that (1) has a term of more than ten years, (2) requires expenditures of \$10 million or more, or (3) requires a modification of more than \$500,000 is subject to Board of Supervisors approval.

BACKGROUND

The Congregate Nutrition Services for Older Adults is a program administered by the Human Services Agency and Department of Disability and Aging Services (DAS) that provides free and low-cost meals to seniors to reduce hunger and improve nutrition. Self-Help for the Elderly¹ is an existing provider for the program with a grant agreement that expired in June 2025. In December 2024, the Human Services Agency issued a Request for Proposals (RFP) to identify vendors for six nutrition programs for older adults and adults with disabilities, including Congregate Nutrition Services for Older Adults and Adults with Disabilities.²

The Department received 10 responses to the RFP for the congregate nutrition services program for older adults, which were scored by an evaluation panel as shown below in Exhibit 1.³

¹ Self-Help for the Elderly is a nonprofit organization founded in San Francisco in 1966. The organization provides services to older adults and operates in San Francisco, San Mateo, Santa Clara Alameda, and Contra Costa counties.

² The other five programs included: (a) to-go meal program; (b) Choosing Healthy Appetizing Meal Plan Solutions for Seniors (CHAMPSS) congregate meal program; (c) home-delivered meal program; (d) citywide emergency home-delivered meal program; and (e) culturally responsive supplemental grocery program.

³ The panel consisted of a Health Educator from the Department of Public Health, a Health Services Manager from San Mateo County Health, Aging and Adult Services, and a retired Director of a non-profit that specializes in grant making.

Exhibit 1: RFP Results for Congregate Nutrition Services for Older Adults

Respondent	Score
Glide	90
Centro Latino	87
Bayview Senior Services	85
Project Open Hand	85
Self Help for the Elderly	84
Kimochi	81
St. Francis*	81
Episcopal Community Services	80
On Lok	80
Russian American Community Services	74

Source: HSA

*St. Francis did not receive a grant award. According to DAS staff, St. Francis submitted a proposal for a multicultural breakfast program in District 5 only. There were two other respondents who submitted a proposal for multicultural breakfast in District 5 and scored higher than St. Francis (Glide and Project Open Hand).

DAS awarded grant agreements to nine proposers, including Self-Help for the Elderly. Self-Help for the Elderly was awarded a contract for \$11,125,299 with a four-year term from July 1, 2025, through June 30, 2029.

Reduction in Meals across DAS Nutrition Programs

Across DAS nutrition programs, the cost of food is increasing by more than local, state, and federal funding, resulting in a decline in the projected number of meals provided to older adults and adults with disabilities in FY 2025-26. According to data provided by DAS staff, the Congregate Nutrition Services program served ten percent fewer meals in FY 2024-25 and an additional ten percent fewer meals will be served in FY 2025-26. Over the two-year period, the number of meals served will decline from 1.4 million served in FY 2023-24 to 1.1 million in FY 2025-26, a decline of 19 percent, despite an 18 percent increase in grant budgets. In addition, the number of clients served is increasing from 19,296 in FY 2023-24 to 22,150 in FY 2025-26, an increase of 15 percent, resulting in fewer meals per client served. As discussed below, the proposed new agreement with Self-Help for the Elderly reflects a 61 percent reduction in meals and a 30 percent reduction in clients annually compared to FY 2023-24 levels under the existing agreement. According to DAS staff, clients may be turned away from congregate meals sites due to the reduction in meals.

DETAILS OF PROPOSED LEGISLATION

The proposed resolution would approve a new grant agreement between the Department of Disability and Aging Services and Self-Help for the Elderly for congregate nutrition services for older adults for a four-year term from July 1, 2025 to June 30, 2029 and a total not to exceed amount of \$11,125,299.

Under the proposed agreement, Self-Help will provide congregate meals and other nutrition services to older adults and people with disabilities. In addition to providing direct meal services, Self-Help is required to provide nutrition education and conduct annual nutrition risk screenings. To qualify for services, an individual must meet one of the following criteria: (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 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; or (5) a volunteer under the age of 60 if sufficient meals are available.

The congregate nutrition services program is intended to support individual's ability to live independently, ensure health and well-being through improved nutrition, to reduce isolation, and serve as an access point for other services. The program provides services at 11 sites to serve 4,310 unduplicated clients annually, as shown in Exhibit 2 below. The program will provide at least one meal five days per week at each site.

Exhibit 2: Self-Help Congregate Meal Sites

Site Name	Address	Neighborhood	Unduplicated Clients
Jackie Chan Senior Center*	5757 Geary Blvd	Richmond	650
Manilatown Senior Center	848 Kearny St	Chinatown	220
Geen Mun Senior Center*	777 Stockton St	Chinatown	720
Lady Shaw Senior Center*	1483 Mason St	Chinatown	350
South Sunset Senior Center	2601 40th Ave	South Sunset	450
Chi Sing Community Center	3133 Taraval St	Taraval	450
Woolf House Senior Center	801 Howard St	South of Market	300
Mendelsohn House*	737 Folsom St	South of Market	250
West Portal Club House	131 Lenox Way	West Portal	310
John King Senior Center*	500 Raymond Ave	Vistacion Valley	360
Geneva Community Center*	5050 Mission St	Excelsior/ Outer Mission	250
Total			4,310

Source: Appendix F, Proposed Grant Agreement

*DAS conducted site visits of six of these sites as part of program monitoring for FY 2023-24

Change In Contracted Level of Service

Under the proposed grant agreement, Self-Help would provide 180,026 meals annually to 4,310 unduplicated clients. This reflects a reduction of 11,918 meals (or six percent) and an increase of 435 clients (or 11 percent) annually compared to the FY 2024-25 budget. However, the number of meals and clients declined in FY 2024-25 due to higher operational costs according to DAS staff. The proposed grant agreement reflects a 61 percent reduction in meals and 30 percent reduction in clients compared to FY 2023-24 levels as shown in Exhibit 3 below. According to DAS staff, clients may be turned away from congregate meal sites due to the reduction in meals.

Exhibit 3: Self-Help Congregate Meal Sites

	<i>Existing Agreement</i>		<i>Proposed</i>	2-Year		1-Year	
	FY 23-24	FY 24-25	FY 25-26	Change	%	Change	%
Unduplicated Clients	5,620	3,875	4,310	-1,310	-30%	435	11%
Meals	290,292	191,944	180,026	-110,266	-61%	-11,918	-6%
Meals per Client	52	50	42	-10	-24%	-8	-16%
Total Annual Budget	\$3,817,267	\$3,452,365	\$3,323,184	-\$494,083	-15%	-\$129,181	-4%
City Annual Contribution	\$2,547,038	\$2,414,739	\$2,528,477	-\$18,561	-1%	\$113,738	5%
Total Cost per Meal	\$13.15	\$17.99	\$18.46	\$5.31	29%	0.47	3%
City Cost per Meal	\$8.77	\$12.58	\$14.05	\$5.27	38%	1.46	12%

Source: DAS

Performance Monitoring

DAS staff conducted program monitoring site visits for FY 2023-24 in May and June 2024 for Self-Help for the Elderly programs. A summary of the FY 2023-24 performance results is provided in Exhibit 4 below. As shown, Self-Help served 89 percent of the unduplicated client objective of 5,500 and delivered 99 percent of contracted meals. Self-Help achieved or exceeded all five performance objectives specified in the grant agreement. However, Self-Help surveyed 665 clients, which is less than the average daily number of meals served (805), which is the target sample size specified in the agreement.

Exhibit 4: FY 2023-24 Performance Results

Objective	Objective	Actual
Unduplicated Clients Served	5,500	4,885
Meals Served	219,050	216,168
% of unduplicated clients surveyed	Avg number of daily meals served (805)	665
Increased consumption of fruits, vegetables and/or whole grains	75%	98%
Feel less worried about getting enough food to meet their needs	85%	97%
Rate quality of food as excellent or good	85%	90%
Feel a greater sense of connection to community	85%	97%
Feel safe and welcomed by program staff*	85%	99%

Source: Program monitoring report provided by DAS

* Measure not included in proposed agreement

The proposed agreement maintains four of the five existing performance measures shown above and adds one new measure: at least 85 percent of survey respondents report that the food support received helps them live stably in the community.

Fiscal Monitoring

HSA completed fiscal and compliance monitoring of the grantee for FY 2024-25 and identified no findings.

FISCAL IMPACT

The projected uses of funds over the four-year term of the grant agreement are shown in Exhibit 5 below.

Exhibit 5: Projected Uses of Funds for Grant Agreement

Uses	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	Total
Salaries & Benefits	\$789,686	\$789,686	\$789,686	\$789,686	\$3,158,744
Operating Expenses	1,388,986	1,388,986	1,388,986	1,388,986	5,555,944
Indirect Cost (15%)	326,801	326,801	326,801	326,801	1,307,204
NCQA Expenditures ⁴	23,004	23,004	23,004	23,004	92,016
Total	2,528,477	2,528,477	2,528,477	2,528,477	\$10,113,908
Contingency (10%)					1,011,391
Not to Exceed					\$11,125,299

Source: Appendix B, Proposed Grant Agreement

Funding Sources

The grant agreement includes a 10 percent contingency to cover unanticipated expenses. The annual budget of \$2.5 million is largely funded by the General Fund.

In addition to HSA's grant, Self-Help for the Elderly anticipates that it will provide approximately \$0.8 million in annual program funding through fundraising, project income, and in-kind volunteering.

Cost per Meal

The average cost per meal is \$18.46. City funding provides \$14.05 per meal, and Self-Help for the Elderly funding and in-kind volunteering is subsidizing costs by \$4.41 per meal. Annual city costs (14.05 per meal) are increasing compared to the existing agreement (\$8.77 per meal in FY 2023-24 and \$12.58 per meal in FY 2024-25) largely due to increases in the total cost per meal. According to DAS staff, the total cost per meal is increasing from \$13.15 in FY 2023-24 to \$18.46 in FY 2025-26 due to rising operational and staffing costs as well as decreases in voluntary contributions from clients.

RECOMMENDATION

Approve the proposed resolution.

⁴ Nutrition Compliance and Quality Assurance (NCQA) are required components of congregate and home-delivered nutrition services that include actions that ensure food safety, certify menu compliance, provide nutrition education, confirm consumer eligibility, nutrition counseling, and assessing consumers' well-being and need for nutrition and other supportive services.

**CITY AND COUNTY OF SAN FRANCISCO
HUMAN SERVICES AGENCY**

GRANT AGREEMENT

between

CITY AND COUNTY OF SAN FRANCISCO

and

Self-Help for the Elderly

THIS GRANT AGREEMENT (“Agreement”) is made as of **July 1, 2025**, in the City and County of San Francisco, State of California, by and between **SELF HELP FOR THE ELDERLY, 731 Sansome Street, Suite #100, San Francisco, CA 94111** (“Grantee”) and the **CITY AND COUNTY OF SAN FRANCISCO**, a municipal corporation (“City”) acting by and through the **Department of Disability and Aging Services** (“Department”),

RECITALS

WHEREAS, the Agreement was competitively procured as required through **RFP 1177-Congregate Nutrition Services for Older Adults issued on December 31, 2024** and is consistent therewith; and

WHEREAS, Grantee has applied to the Department for a grant to fund the matters set forth in a grant plan and summarized briefly as follows:

To provide Congregate Nutrition Program for Older Adults; and

WHEREAS, the City’s Board of Supervisors approved this Agreement by Resolution Number #_____ on _____; and

WHEREAS, the Grant is funded with Federal dollars, CFDA #93.053, and

WHEREAS, City desires to provide such a grant on the terms and conditions set forth herein:

NOW, THEREFORE, in consideration of the premises and the mutual covenants contained in this Agreement and for other good and valuable consideration, the receipt and adequacy of which is acknowledged, the parties agree as follows:

ARTICLE 1 DEFINITIONS

1.1. Specific Terms. Unless the context otherwise requires, the following capitalized terms (whether singular or plural) shall have the meanings set forth below:

- (a) **“ADA”** shall mean the Americans with Disabilities Act (including all rules and regulations thereunder) and all other applicable federal, state and local disability rights legislation, as the same may be amended, modified or supplemented from time to time.
- (b) **“Application Documents”** shall mean collectively: (i) the grant application submitted by Grantee, including all exhibits, schedules, appendices and attachments thereto; (ii) all documents, correspondence and other written materials submitted with respect to the grant application; and (iii) all amendments, modifications or supplements to any of the foregoing approved in writing by City.
- (c) **“Budget”** shall mean the budget attached hereto as part of Appendix B.
- (d) **“Charter”** shall mean the Charter of City.
- (e) **“Contractor”** shall have the meaning as “Grantee” if used in this Agreement, as certain City contracting requirements also apply to grants of the City of San Francisco.
- (f) **“Controller”** shall mean the Controller of City.
- (g) **“Eligible Expenses”** shall have the meaning set forth in Appendix B.
- (h) **“Event of Default”** shall have the meaning set forth in Section 11.1.
- (i) **“Fiscal Quarter”** shall mean each period of three (3) calendar months commencing on July 1, October 1, January 1 and April 1, respectively.
- (j) **“Fiscal Year”** shall mean each period of twelve (12) calendar months commencing on July 1 and ending on June 30 during which all or any portion of this Agreement is in effect.
- (k) **“Funding Request”** shall have the meaning set forth in Section 5.3(a).
- (l) **“Grant”** shall mean this Agreement.
- (m) **“Grant Funds”** shall mean any and all funds allocated or disbursed to Grantee under this Agreement.
- (n) **“Grant Plan”** shall have the meaning set forth in Appendix A and B.
- (o) **“Indemnified Parties”** shall mean: (i) City, including the Department and all commissions, departments, agencies and other subdivisions of City; (ii) City's elected officials, directors, officers, employees, agents, successors and assigns; and (iii) all persons or entities acting on behalf of any of the foregoing.
- (p) **“Losses”** shall mean any and all liabilities, obligations, losses, damages, penalties, claims, actions, suits, judgments, fees, expenses and costs of whatsoever kind and nature (including

legal fees and expenses and costs of investigation, of prosecuting or defending any Loss described above) whether or not such Loss be founded or unfounded, of whatsoever kind and nature.

(q) **“Publication”** shall mean any report, article, educational material, handbook, brochure, pamphlet, press release, public service announcement, web page, audio or visual material or other communication for public dissemination, which relates to all or any portion of the Grant Plan or is paid for in whole or in part using Grant Funds.

- 1.2. Additional Terms.** The terms “as directed,” “as required” or “as permitted” and similar terms shall refer to the direction, requirement, or permission of the Department. The terms “sufficient,” “necessary” or “proper” and similar terms shall mean sufficient, necessary or proper in the sole judgment of the Department. The terms “approval,” “acceptable” or “satisfactory” or similar terms shall mean approved by, or acceptable to, or satisfactory to the Department. The terms “include,” “included” or “including” and similar terms shall be deemed to be followed by the words “without limitation”. The use of the term “subcontractor,” “successor” or “assign” herein refers only to a subcontractor (“subgrantee”), successor or assign expressly permitted under Article 13.
- 1.3. References to this Agreement.** References to this Agreement include: (a) any and all appendices, exhibits, schedules, attachments hereto; (b) any and all statutes, ordinances, regulations or other documents expressly incorporated by reference herein; and (c) any and all amendments, modifications or supplements hereto made in accordance with Section 17.2. References to articles, sections, subsections or appendices refer to articles, sections or subsections of or appendices to this Agreement, unless otherwise expressly stated. Terms such as “hereunder,” herein or “hereto” refer to this Agreement as a whole.

ARTICLE 2

APPROPRIATION AND CERTIFICATION OF GRANT FUNDS; LIMITATIONS ON CITY'S OBLIGATIONS

- 2.1 Risk of Non-Appropriation of Grant Funds.** This Agreement is subject to the budget and fiscal provisions of the Charter. City shall have no obligation to make appropriations for this Agreement in lieu of appropriations for new or other agreements. Grantee acknowledges that City budget decisions are subject to the discretion of its Mayor and Board of Supervisors. Grantee assumes all risk of possible non-appropriation or non-certification of funds, and such assumption is part of the consideration for this Agreement.
- 2.2 Certification of Controller.** Charges will accrue only after prior written authorization certified by the Controller, and the amount of City’s obligation shall not at any time exceed the amount certified for the purpose and period stated in such advance authorization.
- 2.3 Automatic Termination for Non-Appropriation of Funds.** This Agreement shall automatically terminate, without penalty, liability or expense of any kind to City, at the end of any Fiscal Year if funds are not appropriated for the next succeeding Fiscal Year. If funds are appropriated for a portion of any Fiscal Year, this Agreement shall terminate, without penalty, liability or expense of any kind to City, at the end of such portion of the Fiscal Year.
- 2.4 SUPERSEDURE OF CONFLICTING PROVISIONS.** IN THE EVENT OF ANY CONFLICT BETWEEN ANY OF THE PROVISIONS OF THIS ARTICLE 2 AND ANY OTHER PROVISION OF THIS AGREEMENT, THE APPLICATION DOCUMENTS OR ANY

OTHER DOCUMENT OR COMMUNICATION RELATING TO THIS AGREEMENT, THE TERMS OF THIS ARTICLE 2 SHALL GOVERN.

- 2.5 Maximum Costs.** Except as may be provided by City ordinances governing emergency conditions, City and its employees and officers are not authorized to request Grantee to perform services or to provide materials, equipment and supplies that would result in Grantee performing services or providing materials, equipment and supplies that are beyond the scope of the services, materials, equipment and supplies specified in this Agreement unless this Agreement is amended in writing and approved as required by law to authorize the additional services, materials, equipment or supplies. City is not required to pay Grantee for services, materials, equipment or supplies provided by Grantee that are beyond the scope of the services, materials, equipment and supplies agreed upon herein and not approved by a written amendment to this Agreement lawfully executed by City. City and its employees and officers are not authorized to offer or promise to Grantee additional funding for this Agreement that exceeds the maximum amount of funding provided for herein. Additional funding for this Agreement in excess of the maximum provided herein shall require lawful approval and certification by the Controller. City is not required to honor any offered or promised additional funding which exceeds the maximum provided in this Agreement which requires lawful approval and certification of the Controller when the lawful approval and certification by the Controller has not been obtained. The Controller is not authorized to make payments on any agreement for which funds have not been certified as available in the budget or by supplemental appropriation.

ARTICLE 3 TERM

- 3.1 Effective Date.** This Agreement shall become effective when the Controller has certified to the availability of funds as set forth in Section 2.2 and the Department has notified Grantee thereof in writing.
- 3.2 Duration of Term.** The term of this Agreement shall commence on **July 1, 2025** and expire on **June 30, 2029**, unless earlier terminated as otherwise provided herein. Grantee shall not begin performance of its obligations under this Agreement until it receives written notice from City to proceed.

ARTICLE 4 IMPLEMENTATION OF GRANT PLAN

- 4.1 Implementation of Grant Plan; Cooperation with Monitoring.** Grantee shall diligently and in good faith implement the Grant Plan on the terms and conditions set forth in this Agreement and, to the extent that they do not differ from this Agreement, the Application Documents. Grantee shall not materially change the nature or scope of the Grant Plan during the term of this Agreement without the prior written consent of City. Grantee shall promptly comply with all standards, specifications and formats of City, as they may from time to time exist, related to evaluation, planning and monitoring of the Grant Plan and shall cooperate in good faith with City in any evaluation, planning or monitoring activities conducted or authorized by City.
- 4.2 Qualified Personnel.** The Grant Plan shall be implemented only by competent personnel under the direction and supervision of Grantee.
- 4.3 Ownership of Results.** Any interest of Grantee or any subgrantee, in drawings, plans, specifications, studies, reports, memoranda, computation sheets, the contents of computer

diskettes, or other documents or Publications prepared by Grantee or any subgrantee in connection with this Agreement or the implementation of the Grant Plan or the services to be performed under this Agreement, shall become the property of and be promptly transmitted to City. Notwithstanding the foregoing, Grantee may retain and use copies for reference and as documentation of its experience and capabilities.

4.4 Works for Hire. If, in connection with this Agreement or the implementation of the Grant Plan, Grantee or any subgrantee creates artwork, copy, posters, billboards, photographs, videotapes, audiotapes, systems designs, software, reports, diagrams, surveys, source codes or any other original works of authorship or Publications, such creations shall be works for hire as defined under Title 17 of the United States Code, and all copyrights in such creations shall be the property of City. If it is ever determined that any such creations are not works for hire under applicable law, Grantee hereby assigns all copyrights thereto to City, and agrees to provide any material, execute such documents and take such other actions as may be necessary or desirable to effect such assignment. With the prior written approval of City, Grantee may retain and use copies of such creations for reference and as documentation of its experience and capabilities. Grantee shall obtain all releases, assignments or other agreements from subgrantees or other persons or entities implementing the Grant Plan to ensure that City obtains the rights set forth in this Grant.

4.5 Publications and Work Product.

- (a) Grantee understands and agrees that City has the right to review, approve, disapprove or conditionally approve, in its sole discretion, the work and property funded in whole or part with the Grant Funds, whether those elements are written, oral or in any other medium. Grantee has the burden of demonstrating to City that each element of work or property funded in whole or part with the Grant Funds is directly and integrally related to the Grant Plan as approved by City. City shall have the sole and final discretion to determine whether Grantee has met this burden.
- (b) Without limiting the obligations of Grantee set forth in subsection (a) above, Grantee shall submit to City for City's prior written approval any Publication, and Grantee shall not disseminate any such Publication unless and until it receives City's consent. In addition, Grantee shall submit to City for approval, if City so requests, any other program material or form that Grantee uses or proposes to use in furtherance of the Grant Plan, and Grantee shall promptly provide to City one copy of all such materials or forms within two (2) days following City's request. The City's approval of any material hereunder shall not be deemed an endorsement of, or agreement with, the contents of such material, and the City shall have no liability or responsibility for any such contents. The City reserves the right to disapprove any material covered by this section at any time, notwithstanding a prior approval by the City of such material. Grantee shall not charge for the use or distribution of any Publication funded all or in part with the Grant Funds, without first obtaining City's written consent, which City may give or withhold in its sole discretion.
- (c) Grantee shall distribute any Publication solely within San Francisco, unless City otherwise gives its prior written consent, which City may give or withhold in its sole discretion. In addition, Grantee shall furnish any services funded in whole or part with the Grant Funds under this Agreement solely within San Francisco, unless City otherwise gives its prior written consent, which City may give or withhold in its sole discretion.
- (d) City may disapprove any element of work or property funded in whole or part by the Grant Funds that City determines, in its sole discretion, has any of the following characteristics: is

divisive or discriminatory; undermines the purpose of the Grant Plan; discourages otherwise qualified potential employees or volunteers or any clients from participating in activities covered under the Grant Plan; undermines the effective delivery of services to clients of Grantee; hinders the achievement of any other purpose of City in making the Grant under this Agreement; or violates any other provision of this Agreement or applicable law. If City disapproves any element of the Grant Plan as implemented, or requires any change to it, Grantee shall immediately eliminate the disapproved portions and make the required changes. If City disapproves any materials, activities or services provided by third parties, Grantee shall immediately cease using the materials and terminate the activities or services and shall, at City's request, require that Grantee obtain the return of materials from recipients or deliver such materials to City or destroy them.

- (e) City has the right to monitor from time to time the administration by Grantee or any of its subcontractors of any programs or other work, including, without limitation, educational programs or trainings, funded in whole or part by the Grant Funds, to ensure that Grantee is performing such element of the Grant Plan, or causing such element of the Grant Plan to be performed, consistent with the terms and conditions of this Agreement.
- (f) Grantee shall acknowledge City's funding under this Agreement in all Publications. Such acknowledgment shall conspicuously state that the activities are sponsored in whole or in part through a grant from the Department. Except as set forth in this subsection, Grantee shall not use the name of the Department or City (as a reference to the municipal corporation as opposed to location) in any Publication without prior written approval of City.

ARTICLE 5 USE AND DISBURSEMENT OF GRANT FUNDS

5.1 Maximum Amount of Grant Funds.

The amount of the Grant Funds disbursed hereunder shall not exceed **Ten Million, One Hundred Thirteen Thousand, Nine Hundred and Eight Dollars (\$10,113,908)** for the period **from July 1, 2025 to June 30, 2029, plus any contingent amount authorized by City and certified as available by the Controller.**

Contingent amount: Up to **One Million, Eleven Thousand, Three Hundred Ninety-One Dollars (\$1,011,391)** may be available, in the City's sole discretion as a contingency but only subject to written authorization by the City and if monies are certified as available by the Controller.

The maximum amount of Grant Funds disbursed hereunder shall not exceed **Eleven Million, One Hundred Twenty-Five Thousand, Two Hundred Ninety-Nine Dollars (\$11,125,299)** for the period from **July 1, 2025 to June 30, 2029.**

Grantee understands that the maximum amount of Grant Funds disbursement identified above in Section 5.1 of this Agreement, includes the amount shown as the contingent amount and may not to be used in Program Budget(s) attached to this Agreement as Appendix B, and is not available to Grantee without a written revision to the Program Budgets of Appendix B approved by Agency. Grantee further understands that no payment of any portion of this contingency amount will be made unless and until such funds are certified as available by Controller. Grantee agrees to fully comply with these laws, regulations, and policies and procedures.

5.2 Use of Grant Funds. Grantee shall use the Grant Funds only for Eligible Expenses as set forth in Appendix A and for no other purpose. Grantee shall expend the Grant Funds in accordance with the Budget and shall obtain the prior approval of City before transferring expenditures from one line item to another within the Budget.

5.3 Disbursement Procedures. Grant Funds shall be disbursed to Grantee as follows:

- (a) Grantee shall submit to the Department for approval, in the manner specified for notices pursuant to Article 15, a document (a "Funding Request") substantially in the form attached as Appendix C. Any unapproved Funding Requests shall be returned by the Department to Grantee with a brief explanation why the Funding Request was rejected. If any such rejection relates only to a portion of Eligible Expenses itemized in a Funding Request, the Department shall have no obligation to disburse any Grant Funds for any other Eligible Expenses itemized in such Funding Request unless and until Grantee submits a Funding Request that is in all respects acceptable to the Department.
- (b) The Department shall make all disbursements of Grant Funds pursuant to this Section through electronic payment or by check payable to Grantee sent via U.S. mail in accordance with Article 15, unless the Department otherwise agrees in writing, in its sole discretion. For electronic payment, City vendors receiving new contracts, contract renewals, or contract extensions must sign up to receive electronic payments through the City's Automated Clearing House (ACH) payments service/provider. Electronic payments are processed every business day and are safe and secure. To sign up for electronic payments, visit www.sfgov.org/ach. The Department shall make disbursements of Grant Funds no more than once during each **MONTH**.

5.4 State or Federal Funds

- (a) **Disallowance.** With respect to Grant Funds, if any, which are ultimately provided by the state or federal government, Grantee agrees that if Grantee claims or receives payment from City for an Eligible Expense, payment or reimbursement of which is later disallowed by the state or federal government, Grantee shall promptly refund the disallowed amount to City upon City's request. At its option, City may offset all or any portion of the disallowed amount against any other payment due to Grantee hereunder or under any other Agreement. Any such offset with respect to a portion of the disallowed amount shall not release Grantee from Grantee's obligation hereunder to refund the remainder of the disallowed amount.
- (b) **Grant Terms.** The funding for this Agreement is provided in full or in part by a Federal or State Grant to the City. As part of the terms of receiving the funds, the City is required to incorporate some of the terms into this Agreement and include certain reporting requirements. The incorporated terms and requirements are stated in Appendix **H and I**.
- (c) **Single Audit Requirements.** Grantees that expend \$750,000 or more in a fiscal year that began after December 26, 2014 from any and all Federal awards shall have a single audit conducted in each of those fiscal years accordance with 2 CFR Part 200 Subpart F . Grantees that expend less than \$750,000 a year in Federal awards are exempt from the single audit requirements for that year, but records must be available for review or audit by appropriate officials of the Federal Agency, pass-through entity and General Accounting Office, and are still subject to other audit requirements as specified in 2 CFR Subpart F §200.501.

5.5 Cost of Doing Business Adjustment. The City may, acting in its sole discretion, adjust the Grant amount in any year to reflect a Cost of Doing Business ("CODB") adjustment as authorized

by the San Francisco Board of Supervisors. The Board of Supervisors and the Mayor will make the CODB determination annually through the budget process. Grantee understands and agrees that the CODB adjustment is wholly discretionary and not a Grantee entitlement.

ARTICLE 6 REPORTING REQUIREMENTS; AUDITS; PENALTIES FOR FALSE CLAIMS

- 6.1 Regular Reports.** Grantee shall provide, in a prompt and timely manner, financial, operational and other reports, as requested by the Department, in form and substance satisfactory to the Department. Such reports, including any copies, shall be submitted on recycled paper and printed on double-sided pages, to the maximum extent possible.
- 6.2 Organizational Documents.** If requested by City, Grantee shall provide to City the names of its current officers and directors and certified copies of its Articles of Incorporation and Bylaws as well as satisfactory evidence of the valid nonprofit status described in Section 8.1.
- 6.3 Notification of Defaults or Changes in Circumstances.** Grantee shall notify City immediately of (a) any Event of Default or event that, with the passage of time, would constitute an Event of Default; and (b) any change of circumstances that would cause any of the representations and warranties contained in Article 8 to be false or misleading at any time during the term of this Agreement.
- 6.4 Financial Statements.** Pursuant to San Francisco Administrative Code Section 67.32 and Controller requirements, if requested, within sixty (60) days following the end of each Fiscal Year, Grantee shall deliver to City an unaudited balance sheet and the related statement of income and cash flows for such Fiscal Year, all in reasonable detail acceptable to City, certified by an appropriate financial officer of Grantee as accurately presenting the financial position of Grantee. If requested by City, Grantee shall also deliver to City, no later than one hundred twenty (120) days following the end of any Fiscal Year, an audited balance sheet and the related statement of income and cash flows for such Fiscal Year, certified by a reputable accounting firm as accurately presenting the financial position of Grantee.
- 6.5 Books and Records.** Grantee shall establish and maintain accurate files and records of all aspects of the Grant Plan and the matters funded in whole or in part with Grant Funds during the term of this Agreement. Without limiting the scope of the foregoing, Grantee shall establish and maintain accurate financial books and accounting records relating to Eligible Expenses incurred and Grant Funds received and expended under this Agreement, together with all invoices, documents, payrolls, time records and other data related to the matters covered by this Agreement, whether funded in whole or in part with Grant Funds. Grantee shall maintain all of the files, records, books, invoices, documents, payrolls and other data required to be maintained under this Section in a readily accessible location and condition for a period of not less than five (5) years after final payment under this Agreement or until any final audit has been fully completed, whichever is later.
- 6.6 Inspection and Audit.** Grantee shall make available to City, its employees and authorized representatives, during regular business hours all of the files, records, books, invoices, documents, payrolls and other data required to be established and maintained by Grantee under Section 6.5. Grantee shall permit City, its employees and authorized representatives to inspect, audit, examine and make excerpts and transcripts from any of the foregoing. The rights of City

pursuant to this Section shall remain in effect so long as Grantee has the obligation to maintain such files, records, books, invoices, documents, payrolls and other data under this Article 6.

- 6.7 Submitting False Claims** Grantee shall at all times deal in good faith with the City, shall only submit a Funding Request to the City upon a good faith and honest determination that the funds sought are for Eligible Expenses under the Grant, and shall only use Grant Funds for payment of Eligible Expenses as set forth in Appendix A. Any Grantee who commits any of the following false acts shall be liable to the City for three times the amount of damages the City sustains because of the Grantee's act. A Grantee will be deemed to have submitted a false claim to the City if the Grantee: (a) knowingly presents or causes to be presented to an officer or employee of the City a false Funding Request; (b) knowingly disburses Grants Funds for expenses that are not Eligible Expenses; (c) knowingly makes, uses, or causes to be made or used a false record or statement to get a false Funding Request paid or approved by the City; (d) conspires to defraud the City by getting a false Funding Request allowed or paid by the City; or (e) is a beneficiary of an inadvertent submission of a false claim to the City, subsequently discovers the falsity of the claim, and fails to disclose the false claim to the City within a reasonable time after discovery of the false claim.
- 6.8 Grantee's Board of Directors.** Grantee shall at all times be governed by a legally constituted and fiscally responsible board of directors. Such board of directors shall meet regularly and maintain appropriate membership, as established in Grantee's bylaws and other governing documents and shall adhere to applicable provisions of federal, state and local laws governing nonprofit corporations. Grantee's board of directors shall exercise such oversight responsibility with regard to this Agreement as is necessary to ensure full and prompt performance by Grantee of its obligations under this Agreement.

ARTICLE 7 TAXES

- 7.1 Grantee to Pay All Taxes.** Grantee shall pay to the appropriate governmental authority, as and when due, any and all taxes, fees, assessments or other governmental charges, including possessory interest taxes and California sales and use taxes, levied upon or in connection with this Agreement, the Grant Plan, the Grant Funds or any of the activities contemplated by this Agreement.
- 7.2 Use of City Real Property.** If at any time this Agreement entitles Grantee to the possession, occupancy or use of City real property for private gain, the following provisions shall apply:
- (a)** Grantee, on behalf of itself and any subgrantees, successors and assigns, recognizes and understands that this Agreement may create a possessory interest subject to property taxation and Grantee, and any subgrantee, successor or assign, may be subject to the payment of such taxes.
 - (b)** Grantee, on behalf of itself and any subgrantees, successors and assigns, further recognizes and understands that any assignment permitted hereunder and any exercise of any option to renew or other extension of this Agreement may constitute a change in ownership for purposes of property taxation and therefore may result in a revaluation of any possessory interest created hereunder. Grantee shall report any assignment or other transfer of any interest in this Agreement or any renewal or extension thereof to the County Assessor within sixty (60) days after such assignment, transfer, renewal or extension.

- (c) Grantee shall provide such other information as may be requested by City to enable City to comply with any reporting requirements under applicable law with respect to possessory interests.

7.3 Withholding. Grantee agrees that it is obligated to pay all amounts due to the City under the San Francisco Business and Tax Regulations Code during the term of this Agreement. Pursuant to Section 6.10-2 of the San Francisco Business and Tax Regulations Code, Grantee further acknowledges and agrees that City may withhold any payments due to Grantee under this Agreement if Grantee is delinquent in the payment of any amount required to be paid to the City under the San Francisco Business and Tax Regulations Code. Any payments withheld under this paragraph shall be made to Grantee, without interest, upon Grantee coming back into compliance with its obligations.

ARTICLE 8 REPRESENTATIONS AND WARRANTIES

Grantee represents and warrants each of the following as of the date of this Agreement and at all times throughout the term of this Agreement:

- 8.1 Organization; Authorization.** Grantee is a nonprofit corporation, duly organized and validly existing and in good standing under the laws of the jurisdiction in which it was formed. Grantee has established and maintains valid nonprofit status under Section 501(c)(3) of the United States Internal Revenue Code of 1986, as amended, and all rules and regulations promulgated under such Section. Grantee has duly authorized by all necessary action the execution, delivery and performance of this Agreement. Grantee has duly executed and delivered this Agreement and this Agreement constitutes a legal, valid and binding obligation of Grantee, enforceable against Grantee in accordance with the terms hereof.
- 8.2 Location.** Grantee's operations, offices and headquarters are located at the address for notices set forth in Section 15. All aspects of the Grant Plan will be implemented at the geographic location(s), if any, specified in the Grant Plan.
- 8.3 No Misstatements.** No document furnished or to be furnished by Grantee to City in connection with the Application Documents, this Agreement, any Funding Request or any other document relating to any of the foregoing, contains or will contain any untrue statement of material fact or omits or will omit a material fact necessary to make the statements contained therein not misleading, under the circumstances under which any such statement shall have been made.
- 8.4 Conflict of Interest.**
 - (a) Through its execution of this Agreement, Grantee acknowledges that it is familiar with the provision of Section 15.103 of the City's Charter, Article III, Chapter 2 of the City's Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California, and certifies that it does not know of any facts which constitutes a violation of said provisions and agrees that it will immediately notify the City if it becomes aware of any such fact during the term of this Agreement.
 - (b) Not more than one member of an immediate family serves or will serve as an officer, director or employee of Grantee, without the prior written consent of City. For purposes of this subsection, "immediate family" shall include husband, wife, domestic partners, brothers, sisters, children and parents (both legal parents and step-parents).

- 8.5 No Other Agreements with City.** Except as expressly itemized in Appendix D, neither Grantee nor any of Grantee's affiliates, officers, directors or employees has any interest, however remote, in any other agreement with City including any commission, department or other subdivision thereof.
- 8.6 Subcontracts.** Except as may be permitted under Section 13.3, Grantee has not entered into any agreement, arrangement or understanding with any other person or entity pursuant to which such person or entity will implement or assist in implementing all or any portion of the Grant Plan.
- 8.7 Eligibility to Receive Federal Funds.** By executing this Agreement, Grantee certifies that Grantee is not suspended, debarred or otherwise excluded from participation in federal assistance programs. Grantee acknowledges that this certification of eligibility to receive federal funds is a material term of the Agreement.

ARTICLE 9 INDEMNIFICATION AND GENERAL LIABILITY

- 9.1 Indemnification.** Grantee shall indemnify, protect, defend and hold harmless each of the Indemnified Parties from and against any and all Losses arising from, in connection with or caused by: (a) a material breach of this Agreement by Grantee; (b) a material breach of any representation or warranty of Grantee contained in this Agreement; (c) any personal injury caused, directly or indirectly, by any act or omission of Grantee or its employees, subgrantees or agents; (d) any property damage caused, directly or indirectly by any act or omission of Grantee or its employees, subgrantees or agents; (e) the use, misuse or failure of any equipment or facility used by Grantee, or by any of its employees, subgrantees or agents, regardless of whether such equipment or facility is furnished, rented or loaned to Grantee by an Indemnified Party; (f) any tax, fee, assessment or other charge for which Grantee is responsible under Article 7; or (g) any infringement of patent rights, copyright, trade secret or any other proprietary right or trademark of any person or entity in consequence of the use by any Indemnified Party of any goods or services furnished to such Indemnified Party in connection with this Agreement. Grantee's obligations under the immediately preceding sentence shall apply to any Loss that is caused in whole or in part by the active or passive negligence of any Indemnified Party, but shall exclude any Loss caused solely by the willful misconduct of the Indemnified Party. The foregoing indemnity shall include, without limitation, consultants and experts and related costs and City's costs of investigating any claims against the City.
- 9.2 Duty to Defend; Notice of Loss.** Grantee acknowledges and agrees that its obligation to defend the Indemnified Parties under Section 9.1: (a) is an immediate obligation, independent of its other obligations hereunder; (b) applies to any Loss which actually or potentially falls within the scope of Section 9.1, regardless of whether the allegations asserted in connection with such Loss are or may be groundless, false or fraudulent; and (c) arises at the time the Loss is tendered to Grantee by the Indemnified Party and continues at all times thereafter. The Indemnified Party shall give Grantee prompt notice of any Loss under Section 9.1 and Grantee shall have the right to defend, settle and compromise any such Loss; provided, however, that the Indemnified Party shall have the right to retain its own counsel at the expense of Grantee if representation of such Indemnified Party by the counsel retained by Grantee would be inappropriate due to conflicts of interest between such Indemnified Party and Grantee. An Indemnified Party's failure to notify Grantee promptly of any Loss shall not relieve Grantee of any liability to such Indemnified Party pursuant to Section 9.1, unless such failure materially impairs Grantee's ability to defend such Loss. Grantee shall seek the Indemnified Party's prior written consent to settle or compromise any Loss if Grantee contends that such Indemnified Party shares in liability with respect thereto.

- 9.3 Incidental and Consequential Damages.** Losses covered under this Article 9 shall include any and all incidental and consequential damages resulting in whole or in part from Grantee's acts or omissions. Nothing in this Agreement shall constitute a waiver or limitation of any rights that any Indemnified Party may have under applicable law with respect to such damages.
- 9.4 LIMITATION ON LIABILITY OF CITY.** CITY'S OBLIGATIONS UNDER THIS AGREEMENT SHALL BE LIMITED TO THE AGGREGATE AMOUNT OF GRANT FUNDS ACTUALLY DISBURSED HEREUNDER. NOTWITHSTANDING ANY OTHER PROVISION CONTAINED IN THIS AGREEMENT, THE APPLICATION DOCUMENTS OR ANY OTHER DOCUMENT OR COMMUNICATION RELATING TO THIS AGREEMENT, IN NO EVENT SHALL CITY BE LIABLE, REGARDLESS OF WHETHER ANY CLAIM IS BASED ON CONTRACT OR TORT, FOR ANY SPECIAL, CONSEQUENTIAL, INDIRECT OR INCIDENTAL DAMAGES, INCLUDING LOST PROFITS, ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT, THE GRANT FUNDS, THE GRANT PLAN OR ANY ACTIVITIES PERFORMED IN CONNECTION WITH THIS AGREEMENT.

ARTICLE 10

- 10.1 Types and Amounts of Coverage.** Without limiting Grantee's liability pursuant to Article 9, Grantee shall maintain in force, during the full term of this Agreement, insurance in the following amounts and coverages:
- (a)** Workers' Compensation, in statutory amounts, with Employers' Liability Limits not less than one million dollars (\$1,000,000) each accident, injury, or illness.
 - (b)** Commercial General Liability Insurance with limits not less than \$1,000,000 each occurrence and \$2,000,000 general aggregate for Bodily Injury and Property Damage, including Contractual Liability, Personal Injury, Products and Completed Operations; policy must include Abuse and Molestation coverage, and
 - (b)** Commercial Automobile Liability Insurance with limits not less than one million dollars (\$1,000,000) each occurrence Combined Single Limit for Bodily Injury and Property Damage, including Owned, Non-Owned and Hired auto coverage, as applicable.
- 10.2 Additional Requirements for General and Automobile Coverage.** Commercial General Liability and Commercial Automobile Liability insurance policies shall:
- (a)** Name as additional insured City and its officers, agents and employees.
 - (b)** Provide that such policies are primary insurance to any other insurance available to the Additional Insureds, with respect to any claims arising out of this Agreement, and that insurance applies separately to each insured against whom claim is made or suit is brought, except with respect to limits of liability.
- 10.3 Additional Requirements for All Policies.** All policies shall be endorsed to provide at least thirty (30) days' advance written notice to City of cancellation of policy for any reason, nonrenewal or reduction in coverage and specific notice mailed to City's address for notices pursuant to Article 15.

- 10.4 Required Post-Expiration Coverage.** Should any of the insurance required hereunder be provided under a claims-made form, Grantee shall maintain such coverage continuously throughout the term of this Agreement and, without lapse, for a period of three (3) years beyond the expiration or termination of this Agreement, to the effect that, should occurrences during the term hereof give rise to claims made after expiration or termination of the Agreement, such claims shall be covered by such claims-made policies.
- 10.5 General Annual Aggregate Limit/Inclusion of Claims Investigation or Legal Defense Costs.** Should any of the insurance required hereunder be provided under a form of coverage that includes a general annual aggregate limit or provides that claims investigation or legal defense costs be included in such general annual aggregate limit, such general annual aggregate limit shall be double the occurrence or claims limits specified above.
- 10.6 Evidence of Insurance.** Before commencing any operations under this Agreement, Grantee shall furnish to City certificates of insurance, and additional insured policy endorsements, in form and with insurers satisfactory to City, evidencing all coverages set forth above, and shall furnish complete copies of policies promptly upon City's request. Before commencing any operations under this Agreement, Grantee shall furnish to City certificates of insurance and additional insured policy endorsements with insurers with ratings comparable to A-, VIII or higher, that are authorized to do business in the State of California, and that are satisfactory to City, in form evidencing all coverages set forth above. Failure to maintain insurance shall constitute a material breach of this Agreement.
- 10.7 Effect of Approval.** Approval of any insurance by City shall not relieve or decrease the liability of Grantee hereunder.
- 10.8 Insurance for Subcontractors and Evidence of this Insurance.** If a subcontractor will be used to complete any portion of this agreement, the grantee shall ensure that the subcontractor shall provide all necessary insurance and shall name the City and County of San Francisco, its officers, agents, and employees and the grantee listed as additional insureds.

ARTICLE 11 EVENTS OF DEFAULT AND REMEDIES

- 11.1 Events of Default.** The occurrence of any one or more of the following events shall constitute an "Event of Default" under this Agreement:
- (a) False Statement.** Any statement, representation or warranty contained in this Agreement, in the Application Documents, in any Funding Request or in any other document submitted to City under this Agreement is found by City to be false or misleading.
 - (b) Failure to Provide Insurance.** Grantee fails to provide or maintain in effect any policy of insurance required in Article 10.
 - (c) Failure to Comply with Representations and Warranties or Applicable Laws.** Grantee fails to perform or breaches any of the terms or provisions of Article 8 or 16.
 - (d) Failure to Perform Other Covenants.** Grantee fails to perform or breaches any other agreement or covenant of this Agreement to be performed or observed by Grantee as and

when performance or observance is due and such failure or breach continues for a period of ten (10) days after the date on which such performance or observance is due.

- (e) **Cross Default.** Grantee defaults under any other agreement between Grantee and City (after expiration of any grace period expressly stated in such agreement).
- (f) **Voluntary Insolvency.** Grantee (i) is generally not paying its debts as they become due, (ii) files, or consents by answer or otherwise to the filing against it of, a petition for relief or reorganization or arrangement or any other petition in bankruptcy or for liquidation or to take advantage of any bankruptcy, insolvency or other debtors' relief law of any jurisdiction, (iii) makes an assignment for the benefit of its creditors, (iv) consents to the appointment of a custodian, receiver, trustee or other officer with similar powers of Grantee or of any substantial part of Grantee's property or (v) takes action for the purpose of any of the foregoing.
- (g) **Involuntary Insolvency.** Without consent by Grantee, a court or government authority enters an order, and such order is not vacated within ten (10) days, (i) appointing a custodian, receiver, trustee or other officer with similar powers with respect to Grantee or with respect to any substantial part of Grantee's property, (ii) constituting an order for relief or approving a petition for relief or reorganization or arrangement or any other petition in bankruptcy or for liquidation or to take advantage of any bankruptcy, insolvency or other debtors' relief law of any jurisdiction or (iii) ordering the dissolution, winding-up or liquidation of Grantee.

11.2 Remedies upon Event of Default. Upon and during the continuance of an Event of Default, City may do any of the following, individually or in combination with any other remedy:

- (a) **Termination.** City may terminate this Agreement by giving a written termination notice to Grantee of the Event of Default and that, on the date specified in the notice, this Agreement shall terminate and all rights of Grantee hereunder shall be extinguished. In the sole discretion of the City, Grantee may be allowed ten (10) days to cure the default. In the event of termination for default, Grantee will be paid for Eligible Expenses in any Funding Request submitted and approved by City prior to the date of termination specified in such notice.
- (b) **Withholding of Grant Funds.** City may withhold all or any portion of Grant Funds not yet disbursed hereunder, regardless of whether Grantee has previously submitted a Funding Request or whether City has approved the disbursement of the Grant Funds requested in any Funding Request. Any Grant Funds withheld pursuant to this Section and subsequently disbursed to Grantee after cure of applicable Events of Default, if granted by the City in its sole discretion, shall be disbursed without interest.
- (c) **Offset.** City may offset against all or any portion of undisbursed Grant Funds hereunder or against any payments due to Grantee under any other agreement between Grantee and City the amount of any outstanding Loss incurred by any Indemnified Party, including any Loss incurred as a result of the Event of Default.
- (d) **Return of Grant Funds.** City may demand the immediate return of any previously disbursed Grant Funds that have been claimed or expended by Grantee in breach of the terms of this Agreement, together with interest thereon from the date of disbursement at the maximum rate permitted under applicable law.

11.3 Termination for Convenience. City shall have the option, in its sole discretion, to terminate this Agreement at any time for convenience and without cause. City shall exercise this option by giving Grantee written notice that specifies the effective date of termination. Upon receipt of the notice of termination, Grantee shall undertake with diligence all necessary actions to effect the termination of this Agreement on the date specified by City and minimize the liability of Grantee and City to third parties. Such actions shall include, without limitation:

- (a) Halting the performance of all work under this Agreement on the date(s) and in the manner specified by City;
- (b) Terminating all existing orders and subcontracts, and not placing any further orders or subcontracts for materials, services, equipment or other items; and
- (c) Completing performance of any work that City designates to be completed prior to the date of termination specified by City.

In no event shall City be liable for costs incurred by Grantee or any of its subcontractors after the termination date specified by City, except for those costs incurred at the request of City pursuant to this section.

11.4 Remedies Nonexclusive. Each of the remedies provided for in this Agreement may be exercised individually or in combination with any other remedy available hereunder or under applicable laws, rules and regulations. The remedies contained herein are in addition to all other remedies available to City at law or in equity by statute or otherwise and the exercise of any such remedy shall not preclude or in any way be deemed to waive any other remedy.

ARTICLE 12 DISCLOSURE OF INFORMATION AND DOCUMENTS

12.1 Proprietary or Confidential Information of City. Grantee understands and acknowledges that, in the performance of this Agreement or in contemplation thereof, Grantee may have access to private or confidential information that may be owned or controlled by City and that such information may contain proprietary or confidential information, the disclosure of which to third parties may be damaging to City. Grantee agrees that all information disclosed by City to Grantee shall be held in confidence and used only in the performance of this Agreement. Grantee shall exercise the same standard of care to protect such information as a reasonably prudent nonprofit entity would use to protect its own proprietary or confidential data.

12.2 Sunshine Ordinance. Grantee acknowledges and agrees that this Agreement and the Application Documents are subject to Section 67.24(e) of the San Francisco Administrative Code, which provides that contracts, including this Agreement, grantee's bids, responses to Requests for Proposals and all other records of communications between City and persons or entities seeking contracts, shall be open to inspection immediately after a contract has been awarded. Nothing in Section 67.24(e) (as it exists on the date hereof) requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit. All information provided by Grantee covered by Section 67.24(e) (as it may be amended from time to time) will be made available to the public upon request.

12.3 Financial Projections. Pursuant to San Francisco Administrative Code Section 67.32, Grantee agrees upon request to provide City with financial projections (including profit and loss figures)

for the activities and/or projects contemplated by this Grant (“Project”) and annual audited financial statements thereafter. Grantee agrees that all such projections and financial statements shall be public records that must be disclosed.

ARTICLE 13 ASSIGNMENTS AND SUBCONTRACTING

- 13.1 No Assignment by Grantee.** Grantee shall not, either directly or indirectly, assign, transfer, hypothecate, subcontract or delegate all or any portion of this Agreement or any rights, duties or obligations of Grantee hereunder without the prior written consent of City. This Agreement shall not, nor shall any interest herein, be assignable as to the interest of Grantee involuntarily or by operation of law without the prior written consent of City. A change of ownership or control of Grantee or a sale or transfer of substantially all of the assets of Grantee shall be deemed an assignment for purposes of this Agreement.
- 13.2 Agreement Made in Violation of this Article.** Any agreement made in violation of Section 13.1 shall confer no rights on any person or entity and shall automatically be null and void.
- 13.3 Subcontracting.** If Appendix E lists any permitted subgrantees, then notwithstanding any other provision of this Agreement to the contrary, Grantee shall have the right to subcontract on the terms set forth in this Section. If Appendix E is blank or specifies that there are no permitted subgrantees, then Grantee shall have no rights under this Section.
- (a) Limitations.** In no event shall Grantee subcontract or delegate the whole of the Grant Plan. Grantee may subcontract with any of the permitted subgrantees set forth on Appendix E without the prior consent of City; provided, however, that Grantee shall not thereby be relieved from any liability or obligation under this Agreement and, as between City and Grantee, Grantee shall be responsible for the acts, defaults and omissions of any subgrantee or its agents or employees as fully as if they were the acts, defaults or omissions of Grantee. Grantee shall ensure that its subgrantees comply with all of the terms of this Agreement, insofar as they apply to the subcontracted portion of the Grant Plan. All references herein to duties and obligations of Grantee shall be deemed to pertain also to all subgrantees to the extent applicable. A default by any subgrantee shall be deemed to be an Event of Default hereunder. Nothing contained in this Agreement shall create any contractual relationship between any subgrantee and City.
- (b) Terms of Subcontract.** Each subcontract shall be in form and substance acceptable to City and shall expressly provide that it may be assigned to City without the prior consent of the subgrantee. In addition, each subcontract shall incorporate all of the terms of this Agreement, insofar as they apply to the subcontracted portion of the Grant Plan. Without limiting the scope of the foregoing, each subcontract shall provide City, with respect to the subgrantee, the audit and inspection rights set forth in Section 6.6. Upon the request of City, Grantee shall promptly furnish to City true and correct copies of each subcontract permitted hereunder.
- 13.4 Grantee Retains Responsibility.** Grantee shall remain liable for the performance by any assignee or subgrantee of all of the covenants terms and conditions contained in this Agreement.

ARTICLE 14

INDEPENDENT CONTRACTOR STATUS

- 14.1 Nature of Agreement.** Grantee shall be deemed at all times to be an independent contractor and is solely responsible for the manner in which Grantee implements the Grant Plan and uses the Grant Funds. Grantee shall at all times remain solely liable for the acts and omissions of Grantee, its officers and directors, employees and agents. Nothing in this Agreement shall be construed as creating a partnership, joint venture, employment or agency relationship between City and Grantee.
- 14.2 Direction.** Any terms in this Agreement referring to direction or instruction from the Department or City shall be construed as providing for direction as to policy and the result of Grantee's work only, and not as to the means by which such a result is obtained.
- 14.3 Consequences of Recharacterization.**
- (a)** Should City, in its discretion, or a relevant taxing authority such as the Internal Revenue Service or the State Employment Development Division, or both, determine that Grantee is an employee for purposes of collection of any employment taxes, the amounts payable under this Agreement shall be reduced by amounts equal to both the employee and employer portions of the tax due (and offsetting any credits for amounts already paid by Grantee which can be applied against this liability). City shall subsequently forward such amounts to the relevant taxing authority.
 - (b)** Should a relevant taxing authority determine a liability for past services performed by Grantee for City, upon notification of such fact by City, Grantee shall promptly remit such amount due or arrange with City to have the amount due withheld from future payments to Grantee under this Agreement (again, offsetting any amounts already paid by Grantee which can be applied as a credit against such liability).
 - (c)** A determination of employment status pursuant to either subsection (a) or (b) of this Section 14.3 shall be solely for the purposes of the particular tax in question, and for all other purposes of this Agreement, Grantee shall not be considered an employee of City. Notwithstanding the foregoing, if any court, arbitrator, or administrative authority determine that Grantee is an employee for any other purpose, Grantee agrees to a reduction in City's financial liability hereunder such that the aggregate amount of Grant Funds under this Agreement does not exceed what would have been the amount of such Grant Funds had the court, arbitrator, or administrative authority had not determined that Grantee was an employee.

ARTICLE 15

NOTICES AND OTHER COMMUNICATIONS

- 15.1. Requirements.** Unless otherwise specifically provided herein, all notices, consents, directions, approvals, instructions, requests and other communications hereunder shall be in writing, shall be

addressed to the person and address set forth below and may be sent by U.S. mail or e-mail, and shall be addressed as follows:

If to the Department or City: **HUMAN SERVICES AGENCY**
DIRECTOR OF CONTRACTS, GB00
OFFICE OF CONTRACT MANAGEMENT
P.O. BOX 7988
SAN FRANCISCO, CA 94120-7988

If to Grantee: SELF HELP FOR THE ELDERLY
Attn: Anni Chung
731 Sansome Street, Suite #100
San Francisco, CA 94111
Email: annic@selfhelpelderly.org

Any notice of default must be sent by registered mail.

- 15.2 Effective Date.** All communications sent in accordance with Section 15.1 shall become effective on the date of receipt.
- 15.3 Change of Address.** Any party hereto may designate a new address for purposes of this Article 15 by notice to the other party.

ARTICLE 16 COMPLIANCE

16.1 Reserved.

16.2 Nondiscrimination Requirements.

(a) Grantee shall comply with the provisions of San Francisco Labor and Employment Code Articles 131 and 132. Grantee shall incorporate by reference in all subcontracts the provisions of Sections 131.2(a), 131.2(c)-(k), and 132.3 of the San Francisco Labor and Employment Code and shall require all subcontractors to comply with such provisions. Grantee is subject to the enforcement and penalty provisions in Articles 131 and 132.

(b) **Nondiscrimination in the Provision of Employee Benefits.** San Francisco Labor and Employment Code Article 131.2 applies to this Agreement. Grantee does not as of the date of this Agreement, and will not during the term of this Agreement, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for City elsewhere in the United States, discriminate in the provision of employee benefits between employees with domestic partners and employees with spouses and/or between the domestic partners and spouses of such employees, subject to the conditions set forth in San Francisco Labor and Employment Code Article 131.2.

16.3 Reserved.

16.4 Tropical Hardwood and Virgin Redwood Ban. Pursuant to § 804(b) of the San Francisco Environment Code, City urges all grantees not to import, purchase, obtain, or use for any purpose, any tropical hardwood, tropical hardwood wood product, virgin redwood or virgin redwood wood product.

- 16.5 Drug-Free Workplace Policy.** Grantee acknowledges that pursuant to the Federal Drug-Free Workplace Act of 1989, the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited on City premises. Grantee and its employees, agents or assigns shall comply with all terms and provisions of such Act and the rules and regulations promulgated thereunder.
- 16.6 Resource Conservation; Liquidated Damages.** Chapter 5 of the San Francisco Environment Code (Resource Conservation) is incorporated herein by reference. Failure by Grantee to comply with any of the applicable requirements of Chapter 5 will be deemed a material breach of contract. If Grantee fails to comply in good faith with any of the provisions of Chapter 5, Grantee shall be liable for liquidated damages in an amount equal to Grantee's net profit under this Agreement, or five percent (5%) of the total contract amount, whichever is greater. Grantee acknowledges and agrees that the liquidated damages assessed shall be payable to City upon demand and may be offset against any monies due to Grantee from any contract with City.
- 16.7 Compliance with ADA.** Grantee acknowledges that, pursuant to the ADA, programs, services and other activities provided by a public entity to the public, whether directly or through a grantee or contractor, must be accessible to the disabled public. Grantee shall not discriminate against any person protected under the ADA in connection with all or any portion of the Grant Plan and shall comply at all times with the provisions of the ADA.
- 16.8 Minimum Compensation Ordinance.** Labor and Employment Code Article 111 applies to this Agreement. Grantee shall pay covered employees no less than the minimum compensation required by San Francisco Labor and Employment Code Article 111, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. Grantee is subject to the enforcement and penalty provisions in Article 111. Information about and the text of Article 111 is available on the web at <https://www.sf.gov/information/minimum-compensation-ordinance>. Grantee is required to comply with all of the applicable provisions of Article 111, irrespective of the listing of obligations in this Section. By signing and executing this Agreement, Grantee certifies that it complies with Article 111.
- 16.9 Limitations on Contributions.** By executing this Agreement, Grantee acknowledges its obligations under section 1.126 of the City's Campaign and Governmental Conduct Code, which prohibits any person who contracts with, or is seeking a contract with, any department of the City for the rendition of personal services, for the furnishing of any material, supplies or equipment, for the sale or lease of any land or building, for a grant, loan, or loan guarantee, or for a development agreement, from making any campaign contribution to (i) a City elected official if the contract must be approved by that official, a board on which that official serves, or the board of a state agency on which an appointee of that official serves, (ii) a candidate for that City elective office, or (iii) a committee controlled by such elected official or a candidate for that office, at any time from the submission of a proposal for the contract until the later of either the termination of negotiations for such contract or twelve months after the date the City approves the contract. The prohibition on contributions applies to each prospective party to the contract; each member of Grantee's board of directors; Grantee's chairperson, chief executive officer, chief financial officer and chief operating officer; any person with an ownership interest of more than 10 % in Grantee; any subcontractor listed in the bid or contract; and any committee that is sponsored or controlled by Grantee. Grantee certifies that it has informed each such person of the limitation on contributions imposed by Section 1.126 by the time it submitted a proposal for the grant and has provided the names of the persons required to be informed to the City department with whom it is contracting.

- 16.10 First Source Hiring Program.** Contractor must comply with all of the provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code, that apply to this Agreement, and Contractor is subject to the enforcement and penalty provisions in Chapter 83.
- 16.11 Prohibition on Political Activity with City Funds.** In accordance with San Francisco Administrative Code Chapter 12.G, no funds appropriated by the City and County of San Francisco for this Agreement may be expended for organizing, creating, funding, participating in, supporting, or attempting to influence any political campaign for a candidate or for a ballot measure (collectively, “Political Activity”). The terms of San Francisco Administrative Code Chapter 12.G are incorporated herein by this reference. Accordingly, an employee working in any position funded under this Agreement shall not engage in any Political Activity during the work hours funded hereunder, nor shall any equipment or resource funded by this Agreement be used for any Political Activity. In the event Grantee, or any staff member in association with Grantee, engages in any Political Activity, then (i) Grantee shall keep and maintain appropriate records to evidence compliance with this section, and (ii) Grantee shall have the burden to prove that no funding from this Agreement has been used for such Political Activity. Grantee agrees to cooperate with any audit by the City or its designee in order to ensure compliance with this section. In the event Grantee violates the provisions of this section, the City may, in addition to any other rights or remedies available hereunder, (i) terminate this Agreement and any other agreements between Grantee and City, (ii) prohibit Grantee from bidding on or receiving any new City contract for a period of two (2) years, and (iii) obtain reimbursement of all funds previously disbursed to Grantee under this Agreement.
- 16.12 Preservative-treated Wood Containing Arsenic.** Grantee may not purchase preservative-treated wood products containing arsenic in the performance of this Agreement unless an exemption from the requirements of Chapter 13 of the San Francisco Environment Code is obtained from the Department of the Environment under Section 1304 of the Code. The term “preservative-treated wood containing arsenic” shall mean wood treated with a preservative that contains arsenic, elemental arsenic, or an arsenic copper combination, including, but not limited to, chromated copper arsenate preservative, ammoniacal copper zinc arsenate preservative, or ammoniacal copper arsenate preservative. Grantee may purchase preservative-treated wood products on the list of environmentally preferable alternatives prepared and adopted by the Department of the Environment. This provision does not preclude Grantee from purchasing preservative-treated wood containing arsenic for saltwater immersion. The term “saltwater immersion” shall mean a pressure-treated wood that is used for construction purposes or facilities that are partially or totally immersed in saltwater.
- 16.13 Reserved (Working with Minors).**
- 16.14 Protection of Private Information.** Grantee has read and agrees to the terms set forth in San Francisco Administrative Code Sections 12M.2, “Nondisclosure of Private Information,” and 12M.3, “Enforcement” of Administrative Code Chapter 12M, “Protection of Private Information,” which are incorporated herein as if fully set forth. Grantee agrees that any failure of Grantee to comply with the requirements of Section 12M.2 of this Chapter shall be a material breach of the Agreement. In such an event, in addition to any other remedies available to it under equity or law, the City may terminate the Agreement, bring a false claim action against the Grantee pursuant to Chapter 6 or Chapter 21 of the Administrative Code, or debar the Grantee.
- 16.15 Duty to Collect and Record Client Sexual Orientation and Gender Identity (SOGI) Data.**

Contractor shall comply with San Francisco Administrative Code Chapter 104 by seeking to collect and record information about clients' sexual orientation and gender identity, and reporting such data to the Department **annually**. In seeking to collect information about clients' sexual orientation and gender identity, Contractor shall: (1) communicate to clients that the provision of sexual orientation and gender identity information is voluntary, and no direct services shall be denied to clients who decline to provide that information; (2) solicit gender identity and sexual orientation data using questions and approaches consistent with the Department of Public Health's Policies and Procedures entitled "Sexual Orientation Guidelines: Principles for Collecting, Coding, and Reporting Identity Data," reissued on September 2, 2014, and "Sex and Gender Guidelines: Principles for Collecting, Coding, and Reporting Identity Data," reissued on September 2, 2014, or any successor Policies and Procedures; and (3) advise clients that they will protect personally identifiable information regarding clients' sexual orientation and gender identity from unauthorized disclosure, to the extent permitted by law. The duty to collect information about gender identity and sexual orientation shall not apply to the extent such collection is incompatible with any professionally reasonable clinical judgment that is based on articulable facts of clinical significance. Further, Contractor shall protect personally identifiable information from unauthorized disclosure, to the extent permitted by law and as required by the Health Insurance Portability and Accountability Act, the California Medical Information Act, Article 1 of the California Constitution, the California Health and Safety Code and regulations promulgated thereunder, the California Welfare and Institutions Code and regulations promulgated thereunder, and any other applicable provision of federal or state law.

16.16 Public Access to Meetings and Records. If Grantee receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the San Francisco Administrative Code, Grantee shall comply with and be bound by all the applicable provisions of that Chapter. By executing this Agreement, Grantee agrees to open its meetings and records to the public in the manner set forth in Sections 12L.4 and 12L.5 of the Administrative Code. Grantee further agrees to make good-faith efforts to promote community membership on its Board of Directors in the manner set forth in Section 12L.6 of the Administrative Code. Grantee acknowledges that its material failure to comply with any of the provisions of this paragraph shall constitute a material breach of this Agreement. Grantee further acknowledges that such material breach of the Agreement shall be grounds for the City to terminate and/or not renew the Agreement, partially or in its entirety.

16.17 Consideration of Criminal History in Hiring and Employment Decisions.

- (a) Grantee agrees to comply fully with and be bound by all of the provisions of Article 142, "City Contractor/Subcontractor Consideration of Criminal History in Hiring and Employment Decisions," of the San Francisco Labor and Employment Code ("Article 142"), including the remedies provided, and implementing regulations, as may be amended from time to time. The provisions of Article 142 are incorporated by reference and made a part of this Agreement as though fully set forth herein. The text of Article 142 is available on the web at <http://sfgov.org/olse/fco>. Grantee is required to comply with all of the applicable provisions of Article 142, irrespective of the listing of obligations in this Section. Capitalized terms used in this Section and not defined in this Agreement shall have the meanings assigned to such terms in Article 142.
- (b) The requirements of Article 142 shall only apply to a Grantee's or Subcontractor's operations to the extent those operations are in furtherance of the performance of this Agreement, shall apply only to applicants and employees who would be or are performing work in furtherance of this Agreement, and shall apply when the physical location of the employment or

prospective employment of an individual is wholly or substantially within the City of San Francisco. Article 142 shall not apply when the application in a particular context would conflict with federal or state law or with a requirement of a government agency implementing federal or state law.

16.18 Food Service Waste Reduction Requirements. Grantee agrees to comply fully with and be bound by all of the provisions of the Food Service Waste Reduction Ordinance, as set forth in San Francisco Environment Code Chapter 16, including the remedies provided, and implementing guidelines and rules. The provisions of Chapter 16 are incorporated herein by reference and made a part of this Agreement as though fully set forth. This provision is a material term of this Agreement. By entering into this Agreement, Grantee agrees that if it breaches this provision, City will suffer actual damages that will be impractical or extremely difficult to determine; further, Grantee agrees that the sum of one hundred dollars (\$100) liquidated damages for the first breach, two hundred dollars (\$200) liquidated damages for the second breach in the same year, and five hundred dollars (\$500) liquidated damages for subsequent breaches in the same year is reasonable estimate of the damage that City will incur based on the violation, established in light of the circumstances existing at the time this Agreement was made. Such amount shall not be considered a penalty, but rather agreed monetary damages sustained by City because of Grantee's failure to comply with this provision.

16.19 Reserved.

16.20 Distribution of Beverages and Water.

(a) Sugar-Sweetened Beverage Prohibition. Grantee agrees that it shall not sell, provide, or otherwise distribute Sugar-Sweetened Beverages, as defined by San Francisco Administrative Code Chapter 101, as part of its performance of this Agreement.

(b) Packaged Water Prohibition. Grantee agrees that it shall not sell, provide, or otherwise distribute Packaged Water, as defined by San Francisco Environment Code Chapter 24, as part of its performance of this Agreement.

16.21 Compliance with California Department on Aging. If grant is in excess of \$100,000 in California Department of Aging Funding, grantee is required to complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying", Form LLL to be found at:
https://apply07.grants.gov/apply/forms/sample/SFLLL_2_0-V2.0.pdf
https://apply07.grants.gov/apply/forms/sample/GG_LobbyingForm-V1.1.pdf

16.22 Additional Requirements for Federally-Funded Awards

(a) The Grantee shall establish a Dun and Bradstreet (D&B) Data Universal Numbering System (DUNS) number as a universal identifier as per 2 CFR Part 25.

(b) The Grant Agreement is subject to 2 CFR Part 175, Award Term for Trafficking in Persons. Federal funding under this Grant Agreement may be terminated without penalty if the Grantee:

(i) Engages in severe forms of trafficking in persons during the period of time that the award is in effect;

- (ii) Procures a commercial sex act during the period of time that the award is in effect; or
- (iii) Uses forced labor in the performance of the award or sub-awards under the award.

16.23 Compliance with Other Laws.

- (a) Without limiting the scope of any of the preceding sections of this Article 16, Grantee shall keep itself fully informed of City's Charter, codes, ordinances and regulations and all state, and federal laws, rules and regulations affecting the performance of this Agreement and shall at all times comply with such Charter codes, ordinances, and regulations rules and laws.
- (b) Grantee represents that it is in good standing with the California Attorney General's Registry of Charitable Trusts and will remain in good standing during the term of this Agreement. Grantee shall immediately notify City of any change in its eligibility to perform under the Agreement. Upon City request, Grantee shall provide documentation demonstrating its compliance with applicable legal requirements. If Grantee will use any subcontractors/subgrantees/subrecipients to perform the Agreement, Grantee is responsible for ensuring they are also in compliance with the California Attorney General's Registry of Charitable Trusts at the time of grant execution and for the duration of the agreement. Any failure by Grantee or any subcontractors/subgrantees/subrecipients to remain in good standing with applicable requirements shall be a material breach of this Agreement.

ARTICLE 17 MISCELLANEOUS

- 17.1 No Waiver.** No waiver by the Department or City of any default or breach of this Agreement shall be implied from any failure by the Department or City to take action on account of such default if such default persists or is repeated. No express waiver by the Department or City shall affect any default other than the default specified in the waiver and shall be operative only for the time and to the extent therein stated. Waivers by City or the Department of any covenant, term or condition contained herein shall not be construed as a waiver of any subsequent breach of the same covenant, term or condition. The consent or approval by the Department or City of any action requiring further consent or approval shall not be deemed to waive or render unnecessary the consent or approval to or of any subsequent similar act.
- 17.2 Modification.** This Agreement may not be modified, nor may compliance with any of its terms be waived, except by written instrument executed and approved in the same manner as this Agreement.
- 17.3 Administrative Remedy for Agreement Interpretation.** Should any question arise as to the meaning or intent of this Agreement, the question shall, prior to any other action or resort to any other legal remedy, be referred to Department Head, as the case may be, of the Department who shall decide the true meaning and intent of the Agreement. Such decision shall be final and conclusive.
- 17.4 GOVERNING Law; Venue.** The formation, interpretation and performance of this Agreement shall be governed by the laws of the State of California, without regard to its conflict of laws principles. Venue for all litigation relative to the formation, interpretation and performance of this Agreement shall be in San Francisco.

- 17.5 Headings.** All article and section headings and captions contained in this Agreement are for reference only and shall not be considered in construing this Agreement.
- 17.6 Entire Agreement.** This Agreement and the Application Documents set forth the entire Agreement between the parties, and supersede all other oral or written provisions. If there is any conflict between the terms of this Agreement and the Application Documents, the terms of this Agreement shall govern. The following appendices are attached to and a part of this Agreement:
- Appendix A, Services to be Provided**
 - Appendix B, Budget**
 - Appendix C, Method of Payment**
 - Appendix D, Interests in Other City Grants**
 - Appendix E, Permitted Subgrantees**
 - Appendix F, Site Chart**
 - Appendix G, Confidentiality and Privacy of Participant Information**
 - Appendix H, Federal Award Information**
 - Appendix I, Federal Requirements for Subrecipients**
 - Appendix J, California Department of Aging (CDA) Terms**
- 17.7 Certified Resolution of Signatory Authority.** Upon request of City, Grantee shall deliver to City a copy of the corporate resolution(s) authorizing the execution, delivery and performance of this Agreement, certified as true, accurate and complete by the secretary or assistant secretary of Grantee.
- 17.8 Severability.** Should the application of any provision of this Agreement to any particular facts or circumstances be found by a court of competent jurisdiction to be invalid or unenforceable, then (a) the validity of other provisions of this Agreement shall not be affected or impaired thereby, and (b) such provision shall be enforced to the maximum extent possible so as to effect the intent of the parties and shall be reformed without further action by the parties to the extent necessary to make such provision valid and enforceable.
- 17.9 Successors; No Third-Party Beneficiaries.** Subject to the terms of Article 13, the terms of this Agreement shall be binding upon, and inure to the benefit of, the parties hereto and their successors and assigns. Nothing in this Agreement, whether express or implied, shall be construed to give any person or entity (other than the parties hereto and their respective successors and assigns and, in the case of Article 9, the Indemnified Parties) any legal or equitable right, remedy or claim under or in respect of this Agreement or any covenants, conditions or provisions contained herein.
- 17.10 Survival of Terms.** The obligations of Grantee and the terms of the following provisions of this Agreement shall survive and continue following expiration or termination of this Agreement:
- Section 4.3 Ownership of Results.
 - Section 6.4 Financial Statements.
 - Section 6.5 Books and Records.
 - Section 6.6 Inspection and Audit.
 - Section 6.7 Submitting False Claims; Monetary Penalties.
 - Article 7 Taxes.
 - Article 8 Representations and Warranties.
 - Article 9 Indemnification and General Liability.
 - Section 10.4 Required Post-Expiration Coverage.

Article 12	Disclosure of Information and Documents.
Section 13.4	Grantee Retains Responsibility.
Section 14.3	Consequences of Recharacterization.
This Article 17	Miscellaneous.

- 17.11 Further Assurances.** From and after the date of this Agreement, Grantee agrees to do such things, perform such acts, and make, execute, acknowledge and deliver such documents as may be reasonably necessary or proper and usual to complete the transactions contemplated by this Agreement and to carry out the purpose of this Agreement in accordance with this Agreement.
- 17.12 Dispute Resolution Procedure.** The following Dispute Resolution Procedure provides a process to resolve any disputes or concerns relating to the administration of an awarded professional services grant or grant between the City and County of San Francisco and nonprofit health and human services grantees. Grantees and City staff should first attempt to come to resolution informally through discussion and negotiation with the designated contact person in the department. If informal discussion has failed to resolve the problem, grantees and departments should employ the following steps:
- Step 1** The grantee will submit a written statement of the concern or dispute addressed to the Grant/Program Manager who oversees the agreement in question. The writing should describe the nature of the concern or dispute, i.e., program, reporting, monitoring, budget, compliance or other concern. The Grant/Program Manager will investigate the concern with the appropriate department staff that are involved with the nonprofit agency's program, and will either convene a meeting with the grantee or provide a written response to the grantee within 10 working days.
- Step 2** Should the dispute or concern remain unresolved after the completion of Step 1, the grantee may request review by the Division or Department Head who supervises the Grant/Program Manager. This request shall be in writing and should describe why the concern is still unresolved and propose a solution that is satisfactory to the grantee. The Division or Department Head will consult with other Department and City staff as appropriate, and will provide a written determination of the resolution to the dispute or concern within 10 working days.
- Step 3** Should Steps 1 and 2 above not result in a determination of mutual agreement, the grantee may forward the dispute to the Executive Director of the Department or their designee. This dispute shall be in writing and describe both the nature of the dispute or concern and why the steps taken to date are not satisfactory to the grantee. The Department will respond in writing within 10 working days.
- 17.13 Cooperative Drafting.** This Agreement has been drafted through a cooperative effort of both parties, and both parties have had an opportunity to have the Agreement reviewed and revised by legal counsel. No party shall be considered the drafter of this Agreement, and no presumption or rule that an ambiguity shall be construed against the party drafting the clause shall apply to the interpretation or enforcement of this Agreement.
- 17.14 MacBride Principles--Northern Ireland.** Pursuant to San Francisco Administrative Code Section 12F.5, City urges companies doing business in Northern Ireland to move towards resolving employment inequities, and encourages such companies to abide by the MacBride Principles. City urges San Francisco companies to do business with corporations that abide by

the MacBride Principles. By signing below, the person executing this agreement on behalf of Grantee acknowledges and agrees that he or she has read and understood this section.

17.15 Compliance with Laws Requiring Access for People with Disabilities.

17.15.1 Contractor acknowledges that, pursuant to the Americans with Disabilities Act (ADA), programs, services and other activities provided by a public entity to the public, whether directly or through a contractor, must be accessible to people with disabilities. Contractor shall provide the services specified in this Agreement in a manner that complies with the ADA and all other applicable federal, state and local disability rights legislation. Contractor agrees not to discriminate against people with disabilities in the provision of services, benefits or activities provided under this Agreement and further agrees that any violation of this prohibition on the part of Contractor, its employees, agents or assigns will constitute a material breach of this Agreement.

17.15.2 Reserved.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the date first specified herein. The signatories to this Agreement warrant and represent that they have the authority to enter into this agreement on **behalf of the respective parties and to bind them to the terms of this Agreement**

CITY

GRANTEE:

DEPARTMENT OF DISABILITY AND AGING

SELF-HELP FOR THE ELDERLY

By: _____
Kelly Dearman
Executive Director
Department of Disability and Aging Services

By: _____

Approved as to Form:

David Chiu
City Attorney

Print Name: Anni Chung
Title: Executive Director
Address: 731 Sansome Street, Suite 100
City, State ZIP: San Francisco, CA 94111

Phone: 415-677-7600

By: _____
Grace DiLaura
Deputy City Attorney

Federal Tax ID #: 94-1750717
City Supplier Number: 0000011273
DUNS Number : 051409951

Appendix A - Services to be Provided
Self Help for the Elderly
Congregate Nutrition Services for Older Adults
July 1, 2025 – June 30, 2029

I. Purpose

The purpose of this grant is to provide congregate nutrition services to older adults in an in-person congregate setting. Services include meals, nutrition education, nutrition risk screening, and opportunities for socialization. Congregate nutrition services support individuals to live independently in their own homes and communities, help ensure health and well-being through improved nutrition and reduced isolation and serve 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 with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
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.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.

Congregate Nutrition Services	In-person nutrition services provided to eligible individuals in a group setting. This includes the procurement, preparation, transporting and serving of meals that meet nutrition requirements, as well as nutrition education, nutrition risk screening, and opportunities for socialization.
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.
DAS Benefits and Resources Hub	A unit within DAS that is equipped to receive calls from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations. https://www.sfhsa.org/contact-us/locations/das-benefits-and-resources-hub
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, to-go, and home-delivered nutrition services program participants.
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	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment. (CCR Title 22 Sec. 7630)

Food Security Screening	A two-question validated screening tool designed to assess an individual's food security status.
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)
LGBTQIA+	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.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language.
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 complies with the Department of Disability and Aging Services Office of Community Partnerships (DAS OCP) and California Department of Aging (CDA) menu standards, as well as the nutrition requirements of meals. A Registered Dietitian must conduct a nutrient analysis to verify that the menu meets these standards and requirements. (CDA Program Memo 12-17, as amended; California Code of Regulations, Title 22, Section 7638.5)
NCQA	Nutrition Compliance and Quality Assurance are the required components of congregate, to-go, and home-delivered nutrition services that ensure program integrity and quality. These components include but are not limited to ensuring food safety; certifying menu compliance; providing nutrition education; confirming consumer eligibility; and assessing consumers' physiological, socioeconomic, and psychological well-being, as well as their need for nutrition and other supportive services. NCQA also includes nutrition counseling provided by a registered dietitian, when feasible and appropriate.

Nutrition Education Session	An intervention targeting participants and caregivers that involves the dissemination of information, instruction, or training to support food, nutrition, and physical activity choices and behaviors aimed at maintaining or improving health and addressing nutrition-related conditions. The content is consistent with the Dietary Guidelines for Americans (DGA), accurate, culturally sensitive, regionally appropriate, and takes personal preferences into account. Nutrition education sessions are overseen by a Registered Dietitian. Grantees are required to provide an education session at least quarterly for program participants and to record the provision of each session(s), including an estimated number of participants reached, in SF DAS GetCare. (CDA Program Memo 21-23)
Nutrition Requirements of Meals	Each meal provided through congregate, to-go, and home-delivered nutrition services shall comply with the current Dietary Guidelines for Americans (DGA) and provide a minimum of one-third of the Dietary Reference Intakes (DRI), as specified in California Code of Regulations, Title 22, Section 7638.5.
Nutrition Risk Screening	Completion of the DETERMINE Checklist to evaluate the nutrition risk status of congregate, to-go, and home-delivered nutrition services program participants.
OAA	Older Americans Act.
OCP	Office of Community Partnerships.
Older Adult	A person who is 60 years of age or older, used interchangeably with the term “senior”.
Older Californians Nutrition Program Title III C1 and C2 (OCNP)	A program that provides nutrition services as authorized by the Older Americans Act of 1965, as amended, and is administered in accordance with the provisions of California Code of Regulations (CCR), Title 22, Chapter 4, Article 5, Section 7630, and was formerly known as the Elderly Nutrition Program (ENP).
Registered Dietitian (RD)/ Registered Dietitian Nutritionist (RDN)	An individual who meets both of the following criteria: 1) Qualified as specified in Sections 2585 and 2586 of the 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 DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SFHSA	San Francisco Human Services Agency.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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>).
Volunteer	A volunteer is an individual who offers their time and services willingly and without compensation to assist the grantee in various activities to support nutrition services.
Unduplicated Consumer (UDC)	An eligible individual who receives meals through the congregate nutrition services program and whose participation is documented in SF DAS GetCare by the grantee.
Unit of Service (UOS)	A meal provided to an eligible individual. Each meal shall provide one-third (1/3) of the DRI and comply with the most current Dietary Guidelines for Americans. (22 CCR 7638.5, 22 CCR 7638.7)

III. Target Populations

This program is designed to serve all people who can benefit from the services outlined in this Appendix, and particularly those demonstrating the greatest economic and social need. To ensure that the most vulnerable people are aware of and can benefit from this program, grantee shall ensure that program services are accessible to:

1. Persons with low to moderate income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency
4. Persons from communities of color or communities that have historically been under-served
5. Members of the LGBTQIA+ community
6. Persons at risk of institutionalization

IV. Eligibility for Services

1. A person who is sixty (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.
5. A volunteer under the age of sixty (60), if doing so will not deprive an older adult age sixty (60) or older of a meal.

V. Description of Services and Program Requirements

1. Grantee will develop and maintain nutrition policies and procedures that comply with the nutrition and food service standards set forth by the California Retail Food Code (CRFC), California Code of Regulations (CCR) Title 22, the California Department of Aging (CDA), the Department of Disability and Aging Services Office of Community Partnerships (DAS OCP), and the requirements described in this Appendix A.
2. Grantee will provide meals to eligible individuals in a congregate group setting at designated meal site(s), which must be submitted to and pre-approved by DAS OCP. The grantee will ensure that all meal sites comply with applicable federal, state, and local regulations, including those related to restrooms, lighting, and ventilation. Congregate meal sites must be equipped with sturdy tables and chairs suitable for the target population, with tables arranged to promote accessibility and encourage socialization.
3. Grantee shall provide meals that comply with the California Department of Aging's (CDA) Older Californians Nutrition Program (OCNP) Menu Planning Guidance. Each meal must provide a minimum of one-third of the Dietary Reference Intakes (DRIs) and align with the current Dietary Guidelines for Americans. Meals shall be culturally appropriate for the target population(s) served and ready to consume. The grantee shall implement an offer versus serve (OVS) model for congregate meal service, allowing participants to select the food items they wish to eat, to reduce food waste.
4. Grantee will provide at least one (1) meal, five (5) days per week, at each DAS-approved congregate meal site and ensure that sites remain open for nutrition services for a minimum of one (1) hour, unless a lesser frequency or duration is approved by DAS OCP. The grantee will follow their DAS-approved site chart when operating congregate meal sites.
5. Grantee will implement a forecasting system to closely estimate demand and adjust meal production, accordingly, minimizing meal waste through regular review and adaptation based on actual consumption patterns. The grantee may introduce a

consumer reservation system to help manage meal distribution and ensure sufficient availability. The reservation system must include a written policy and process to accommodate a specified number of walk-in consumers, and both the policy and process are subject to DAS OCP approval.

6. Grantee will serve meals in environmentally friendly containers that are reusable, biodegradable, compostable, and/or recyclable. The grantee will comply with the City's Food Service Waste Reduction Ordinance (2007) and the Single-Use Food Ware Plastics Toxics and Litter Reduction Ordinance (2019).
7. Grantee will ensure that each congregate nutrition site has sufficient staff (paid or volunteers) with the appropriate education, experience, and cultural competency designated to oversee the day-to-day operations, with at least one staff member physically present on-site during meal service hours.
8. Grantee will manage all aspects of food service, including the procurement, preparation, transport, delivery, and serving of food and meals. The grantee will ensure compliance with the standards established by the California Retail Food Code (CRFC), California Code of Regulations (CCR) Title 22, and the San Francisco Department of Public Health (SFPDH) Environmental Health Branch. This includes but is not limited to the following:
 - a. A food facility permit, also known as a health permit, is required for each facility involved in the preparation, handling, and/or serving of food to the public. In addition, the facility must provide a current health inspection report with a "pass" facility rating status, as issued by the Environmental Health Branch of San Francisco's Department of Public Health.
 - b. A certified food safety manager must be on staff to oversee and manage the day-to-day operations of food service.
 - c. All staff involved in the preparation, storage, service or handling of food and/or meals must engage in approved food safety training.
9. Grantee will ensure all program staff are oriented and trained to perform their assigned responsibilities and tasks. Training at minimum will include:
 - a. Food safety, prevention of foodborne illness, and HACCP principles.
 - b. Accident prevention, instructions on fire safety, first aid, choking, earthquake preparedness, and additional emergency procedures as relevant.
10. Grantee will provide a minimum of four (4) hours of annual training for paid and volunteer food service staff, including congregate and home-delivered meal staff. The grantee must develop, implement, and maintain a yearly training plan on file. The plan should include the individuals to be trained, the trainer(s), the training content, and the schedule. The content of the training must be reviewed and approved by a Registered Dietitian Nutritionist (RD/RDN). Training sessions will be evaluated by staff, and documentation, including evaluations and attendance records, must be kept on file by the grantee.
11. Grantee will provide the following NCQA activities:

- a. Menu planning and meal analysis shall be conducted twice per year and in accordance with CDA's OCNP Menu Planning Guidance. The grantee must submit the menu cycle with the nutrient analysis for review and approval by DAS OCP at least thirty (30) days in advance of use. The grantee will ensure that food substitutions to originally planned meals are documented and approved by Registered Dietitian Nutritionist (RD/RDN).
 - b. HACCP central kitchen and food service monitoring at least once per quarter and a minimum of four (4) times during the fiscal year conducted and documented by Registered Dietitian Nutritionist (RD/RDN).
 - c. Congregate meal site monitoring must occur at least once per quarter and a minimum of four (4) times during the fiscal year at each DAS OCP-approved congregate meal site. Monitoring must be conducted and documented by a qualified staff member who, at minimum, is trained by either a certified food safety manager or a Registered Dietitian Nutritionist (RD/RDN).
 - d. Nutrition education sessions at least once per quarter and a minimum of four (4) times during the fiscal year at each DAS OCP approved congregate meal site. The grantee will record the delivery of a nutrition education session in SF DAS GetCare and include the estimated number of participants.
12. Grantee will establish and maintain a consumer enrollment process that includes eligibility verification, the collection of required consumer data, completion of a nutrition risk screening using the DETERMINE checklist, and a two-question food security screening. The grantee will document consumer enrollment in the appropriate congregate nutrition program in SF DAS GetCare within one month of obtaining the data, ensuring all collected information is accurately recorded. Additionally, the grantee will establish a disenrollment process for consumers who stop participating in the congregate meal program.
 13. Grantee will conduct annual nutrition risk and food security screenings for consumers who remain actively enrolled in the congregate nutrition program. These screenings must be completed each fiscal year a consumer is enrolled in the program. In addition to conducting the screenings, the grantee will reverify consumer data annually to ensure it is current and accurate. Screening results, along with verified and updated consumer data, must be documented in SF DAS GetCare within one month of receiving the information.
 14. Grantee will offer consumers who receive a meal the opportunity to contribute to the cost of the meal, in accordance with DAS OCP Policy Memorandum No. 5. The grantee will develop a suggested contribution amount that considers the average income range of the consumers accessing the congregate meal program as well as the grantee's other sources of income. A sign will be posted near the contribution collection receptacle indicating the suggested contribution for eligible individuals and the fee for guests. The sign must clearly state that contributions are voluntary, there is no obligation to contribute, and meals will be provided regardless of whether a contribution is made. The contribution process must ensure confidentiality, with a secure container for collecting contributions. The grantee must also have written

procedures in place to protect contributions and fees from loss, mishandling, and theft.

15. Grantee will have procedures in place to obtain the views of program participants about services received. At minimum, the grantee will develop and administer an annual consumer satisfaction survey to capture feedback on program outcomes and service quality. Both the survey tool and the administration plan must be reviewed and approved by DAS OCP prior to implementation. Feedback must be collected in a manner that ensures participant anonymity. The results will be shared with DAS OCP by March 15 of each grant year, or on a mutually agreed upon date.
16. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training annually, in accordance with the DAS OCP Policy Memorandum No. 45. Within 30 days of their start date, any new employee, subcontractor, or volunteer must also complete this training. The grantee will maintain records of completion. The grantee shall comply with the applicable privacy and security rules of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
17. Grantee will ensure that all program staff, regardless of position, receive initial training on elder abuse and mandated reporting. Program staff who interact with consumers must complete this training annually, in accordance with the DAS OCP Policy Memorandum No. 35.
18. Grantee shall develop a written grievance process for reviewing and resolving service concerns raised by consumers or their authorized representatives regarding DAS-funded programs and their employees or volunteers, in accordance with DAS OCP Policy Memorandum No. 33. This process must ensure that consumers have clearly established rights and due process for timely resolution of their concerns.
19. Grantee will ensure that DAS funding information is prominently displayed on its websites and publications related to the DAS-funded nutrition program, in accordance with DAS OCP Policy Memorandum No.47.
20. 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.
21. Grantee will arrange for the availability of food to participants during a major disaster where feasible and appropriate.

VI. Location and Time of Services

The grantee will provide congregate nutrition services in the City and County of San Francisco. The grantee, with approval from DAS OCP, will determine the location(s) and time(s) for the provision of congregate nutrition services.

VII. Service Objectives

On an annual basis, the grantee shall meet the following service objectives:

Table A	FY 25/26	FY 26/27	FY 27/28	FY 28/29
Number of Unduplicated Consumers (UDC)	4310	4310	4310	4310
Number of Meals	180,026	180,026	180,026	180,026

VIII. Outcome Objectives

Measured via a consumer survey with a sample size equal to or greater than the grantee's average daily number of meals served.

1. At least 75% of consumers report an increased consumption of fruits, vegetables, and/or whole grains.
2. At least 85% of consumers report feeling less worried about getting enough food to meet their needs.
3. At least 85% of consumers rate the quality of meals they receive as excellent or good.
4. At least 85% of consumers report feeling a greater sense of connection to their community.
5. At least 85% of consumers report that the food support they receive helps them live stably in the community.

IX. Data Collection and Reporting Requirements

1. Grantee will provide a monthly report of activities, referencing the tasks described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. The report will include, at a minimum: the number of consumers served, number of meals prepared and served, number of consumers denied services, and the amount of voluntary consumer contributions received.
2. Grantee will submit a quarterly report, along with supporting documentation, to DAS OCP detailing the HACCP activities conducted. Reports are due on the following dates: October 15, January 15, April 15, and June 15.
3. Grantee will provide an annual report summarizing the contract activities, referencing the tasks described in Section VII & VIII- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
4. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to SFHSA no later than July 31 each year. The grantee must submit the report in the CARBON system.
5. Grantee will provide Ad Hoc reports as required by the Departments.

6. 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.
7. 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

Name	Address	Phone
30th Street Senior Center	225 30th St, San Francisco, 94131	415-550-2225
Aquatic Park Senior Center	890 Beach St, San Francisco, 94109	415-202-2982
Bayview Senior Connections	1753 Carroll Ave, San Francisco, 94124	415-822-1444 x1200
Canon Kip Senior Center	705 Natoma, St San Francisco, 94103	415-487-3300
Chi Sing Community Center	3133 Taraval St, San Francisco, 94116	415-533-6859
DAS Benefits and Resource Hub	2 Gough St, San Francisco, 94103	415-355-6700
Downtown SF Senior Center	481 O’Farrell St, San Francisco, 94102	415-202-2982
Geen Mun Activity Center	777 Stockton St, San Francisco, 94108	415-438-9804
Geneva Community Center	5050 Mission St., Suite C, San Francisco 94112	
Mission Neighborhood Centers	362 Capp St, San Francisco, 94110	415-653-5750
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, 94102	415-347-8509
Richmond Senior Center	6221 Geary Blvd, San Francisco, 94121	415-405-4672
Self-Help for the Elderly Social Services Department	829 Kearney St, San Francisco, 94133	415-677-7585
Toolworks	22 Battery St. Suite 300, San Francisco, 94111	415-733-0990
Western Addition Senior Center	1390 1/2 Turk St, San Francisco, 94115	415-921-7805
West Portal Clubhouse	131 Lenox Way, San Francisco, 94127	628-502-0828

with disabilities connect to services throughout the City. These Focal Points are:

For assistance with reporting and contract requirements, please contact:

Tahir.Shaikh@sfgov.org
 Senior Contract Manager, Office of Contract Management, SFHSA
 or
 Tiffany.Kearney@sfgov.org
 Program Analyst, DAS OCP

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives; compliance with specific program standards and requirements; participant record collection and maintenance; reporting performance including monthly service unit reports on SF DAS GetCare; maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of

provision of training to staff and volunteers regarding Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff and volunteers; 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 III through VIII.

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

Date: 7/1/2025 – 6/30/2029

Name

SELF-HELP FOR THE ELDERLY

(Check One) New ☒ Renewal ☐ Modification ☐

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

Program: Congregate meals for older adults

Budget Reference Page No.(s)					
Program Term	FY 25/26	FY 26/27	FY 27/28	FY 28/29	Total
Annual # Meals Contracted	180,026	180,026	180,026	180,026	720,104
DAS Expenditures					
Salaries & Benefits	\$789,686	\$789,686	\$789,686	\$789,686	\$3,158,744
Operating Expenses	\$1,388,986	\$1,388,986	\$1,388,986	\$1,388,986	\$5,555,944
Subtotal	\$2,178,672	\$2,178,672	\$2,178,672	\$2,178,672	\$8,714,688
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$326,801	\$326,801	\$326,801	\$326,801	\$1,307,204
Capital/Subcontractor Expenditures					
NCQA Expenditures	\$23,004	\$23,004	\$23,004	\$23,004	\$92,016
Total DAS Expenditures	\$2,528,477	\$2,528,477	\$2,528,477	\$2,528,477	\$10,113,908
Non DAS Expenditures					
Salaries & Benefits	\$228,656	\$228,656	\$228,656	\$228,656	\$914,624
Operating Expenses	\$103,915	\$103,915	\$103,915	\$103,915	\$415,660
Capital/Subcontractor Expenditures					
NCQA Expenditures					
Total Non DAS Expenditures	\$332,571	\$332,571	\$332,571	\$332,571	\$1,330,284
TOTAL DAS AND NON DAS EXPENDITURES	\$2,861,048	\$2,861,048	\$2,861,048	\$2,861,048	\$11,444,192
DAS Revenues					
Meals- General Fund	\$2,505,473	\$2,505,473	\$2,505,473	\$2,505,473	\$10,021,892
Meals- State Fund					
Meals- Federal Fund					
NCQA Fund	\$23,004	\$23,004	\$23,004	\$23,004	\$92,016
Total DAS Revenue	\$2,528,477	\$2,528,477	\$2,528,477	\$2,528,477	\$10,113,908
<i>PER MEAL COST, DAS</i>	\$13.92	\$13.92	\$13.92	\$13.92	\$13.92
<i>PER MEAL COST (with NCQA), DAS</i>	\$14.05	\$14.05	\$14.05	\$14.05	\$14.05
Non DAS Revenues					
Project Income	\$210,630	\$210,630	\$210,630	\$210,630	\$842,522
Agency Cash- Fundraising	\$121,941	\$121,941	\$121,941	\$121,941	\$487,762
Agency In-kind Volunteer	\$462,136	\$462,136	\$462,136	\$462,136	\$1,848,544
NCQA Revenue					

Total Non DAS Revenue	\$794,707	\$794,707	\$794,707	\$794,707	\$3,178,828
<i>PER MEAL COST, Non DAS</i>	\$4.41	\$4.41	\$4.41	\$4.41	\$4.41
<i>PER MEAL COST (with NCQA), Non DAS</i>	\$4.41	\$4.41	\$4.41	\$4.41	\$4.41
TOTAL DAS AND NON DAS REVENUE	\$3,323,184	\$3,323,184	\$3,323,184	\$3,323,184	\$13,292,736
<i>PER MEAL COST, Total</i>	\$18.33	\$18.33	\$18.33	\$18.33	\$18.33
<i>PER MEAL COST (with NCQA), Total</i>	\$18.46	\$18.46	\$18.46	\$18.46	\$18.46
Full Time Equivalent (FTE)	47.00	47.00	47.00	47.00	188.00
Prepared by: Leny Nair	Date: 4/14/2025				
HSA-CO Review Signature:					
HSA #1	10/25/2016				

Program: Congregate meals for older adults (Same as Line 11 on HSA #1)						Appendix B, Page 2 Document Date: 4/14/2025				
Salaries & Benefits Detail										
DAS Salaries & Benefits		Agency Totals		HSA Program		FY 25/26	FY 26/27	FY 27/28	FY 28/29	Total
Position Title	Name	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Director of Nutrition	Karen	\$97,850	1.00	10.00%	0.10	\$9,785	\$9,785	\$9,785	\$9,785	\$39,140
Interim Congregate Project Manager	Steven	\$72,814	1.00	10.00%	0.10	\$7,281	\$7,281	\$7,281	\$7,281	\$29,124
Congregate Manager	Lance	\$70,743	1.00	40.00%	0.40	\$28,297	\$28,297	\$28,297	\$28,297	\$113,188
Asst Congregate Manager	Dongfang	\$53,518	1.00	40.00%	0.40	\$21,407	\$21,407	\$21,407	\$21,407	\$85,628
Center Coordinators	CHEN	\$43,805	1.00	35.00%	0.35	\$15,332	\$15,332	\$15,332	\$15,332	\$61,328
Center Coordinators	CHOW	\$45,657	1.00	35.00%	0.35	\$15,980	\$15,980	\$15,980	\$15,980	\$63,920
Center Coordinators	HUANG	\$45,657	1.00	35.00%	0.35	\$15,980	\$15,980	\$15,980	\$15,980	\$63,920
Center Coordinators	KWONG	\$46,114	1.00	60.00%	0.60	\$27,668	\$27,668	\$27,668	\$27,668	\$110,672
Center Coordinators	LAM	\$45,219	1.00	60.00%	0.60	\$27,131	\$27,131	\$27,131	\$27,131	\$108,524
Center Coordinators	LI	\$45,656	1.00	35.00%	0.35	\$15,980	\$15,980	\$15,980	\$15,980	\$63,920
Center Coordinators	MA	\$45,656	1.00	35.00%	0.35	\$15,980	\$15,980	\$15,980	\$15,980	\$63,920
Center Coordinators	YANG	\$46,114	1.00	35.00%	0.35	\$16,140	\$16,140	\$16,140	\$16,140	\$64,560
Center Coordinators	ZENG	\$43,389	1.00	35.00%	0.35	\$15,186	\$15,186	\$15,186	\$15,186	\$60,744
Center Coordinators	MA	\$46,114	1.00	35.00%	0.35	\$16,140	\$16,140	\$16,140	\$16,140	\$64,560
Center Coordinators	Xing	\$43,806	1.00	35.00%	0.35	\$15,332	\$15,332	\$15,332	\$15,332	\$61,328
Mealsite Workers	IP	\$42,120	1.00	85.00%	0.85	\$35,802	\$35,802	\$35,802	\$35,802	\$143,208
Mealsite Workers	LI	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	LIANG	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	LIAO	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	RONG	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	TAM	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	WONG	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	WU	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	YE	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	Huang	\$42,120	1.00	75.00%	0.75	\$31,590	\$31,590	\$31,590	\$31,590	\$126,360
Mealsite Workers	TBH	\$42,120	1.00	17.00%	0.17	\$7,160	\$7,160	\$7,160	\$7,160	\$28,640
Admin Coordinator	Chan	\$51,418	1.00	50.00%	0.50	\$25,709	\$25,709	\$25,709	\$25,709	\$102,836
Registered Dietitian	Siew	\$104,000	1.00	5.00%	0.05	\$5,200	\$5,200	\$5,200	\$5,200	\$20,800
Totals		\$1,410,850	28.00	1367.00%	13.67	\$621,800	\$621,800	\$621,800	\$621,800	\$2,487,200
Fringe Benefits Rate		27.00%								
Employee Fringe Benefits		\$380,930				\$167,886	\$167,886	\$167,886	\$167,886	\$671,544
Total DAS Salaries and Benefits		\$1,791,780				\$789,686	\$789,686	\$789,686	\$789,686	\$3,158,744
Non DAS Salaries & Benefits		Agency Totals		HSA Program		FY 25/26	FY 26/27	FY 27/28	FY 28/29	Total
Position Title	Name	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
HDMCOOR	XIAO	\$57,200	1.00	20.80%	0.21	\$11,898	\$11,898	\$11,898	\$11,898	\$47,592
HDMPROAS	WU	\$48,880	1.00	10.42%	0.10	\$5,092	\$5,092	\$5,092	\$5,092	\$20,368
HDMTRPM	NGAN	\$68,661	1.00	11.28%	0.11	\$7,746	\$7,746	\$7,746	\$7,746	\$30,984
HDSUPVR	LU	\$49,920	1.00	19.79%	0.20	\$9,880	\$9,880	\$9,880	\$9,880	\$39,520
HOMEDRIV	HO	\$44,720	1.00	9.38%	0.09	\$4,193	\$4,193	\$4,193	\$4,193	\$16,772
HOMEDRIV	HUI	\$44,720	1.00	9.90%	0.10	\$4,425	\$4,425	\$4,425	\$4,425	\$17,700
HOMEDRIV	LEUNG	\$44,720	1.00	8.33%	0.08	\$3,727	\$3,727	\$3,727	\$3,727	\$14,908
HOMEDRIV	LI	\$44,720	1.00	11.46%	0.11	\$5,124	\$5,124	\$5,124	\$5,124	\$20,496
HOMEDRIV	LIANG	\$43,680	1.00	9.38%	0.09	\$4,095	\$4,095	\$4,095	\$4,095	\$16,380
HOMEDRIV	LIN	\$45,760	1.00	7.81%	0.08	\$3,575	\$3,575	\$3,575	\$3,575	\$14,300
HOMEDRIV	LIN	\$43,680	1.00	20.31%	0.20	\$8,873	\$8,873	\$8,873	\$8,873	\$35,492
HOMEDRIV	LUONG	\$44,720	1.00	3.13%	0.03	\$1,398	\$1,398	\$1,398	\$1,398	\$5,592
HOMEDRIV	XU	\$43,680	1.00	14.06%	0.14	\$6,143	\$6,143	\$6,143	\$6,143	\$24,572
HOMEDRIV	ZHOU	\$43,680	1.00	16.15%	0.16	\$7,053	\$7,053	\$7,053	\$7,053	\$28,212
HOMEDRIV	ZHOU	\$44,720	1.00	10.42%	0.10	\$4,658	\$4,658	\$4,658	\$4,658	\$18,632
HOMEDRIV	ZHU	\$44,720	1.00	11.46%	0.11	\$5,124	\$5,124	\$5,124	\$5,124	\$20,496
HOMEDRIV	On-call	\$44,720	1.00	100.00%	1.00	\$44,720	\$44,720	\$44,720	\$44,720	\$178,880
HOMEWKER	YANG	\$43,680	1.00	52.08%	0.52	\$22,750	\$22,750	\$22,750	\$22,750	\$91,000
Director of Nutrition	Karen	\$97,850	1.00	20.00%	0.20	\$19,570	\$19,570	\$19,570	\$19,570	\$78,280
Totals		\$944,431	19.00	366.14%	3.66	\$180,044	\$180,044	\$180,044	\$180,044	\$720,176
Fringe Benefits Rate		27.00%								
Employee Fringe Benefits		\$254,996				\$48,612	\$48,612	\$48,612	\$48,612	\$194,448
Total Non DAS Salaries and Benefits		\$1,199,427				\$228,656	\$228,656	\$228,656	\$228,656	\$914,624

Total DAS and Non DAS Salaries and Benefits	\$2,991,207				\$1,018,342	\$1,018,342	\$1,018,342	\$1,018,342	\$4,073,368
HSA #2									10/25/2016

Operating Expense Detail					
	FY 25/26	FY 26/27	FY 27/28	FY 28/29	Total
Annual # Meals Contracted	180,026	180,026	180,026	180,026	720,104
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property	\$46,000	\$46,000	\$46,000	\$46,000	\$184,000
Utilities (Elec, Water, Gas, Phone, Garbage)	\$44,000	\$44,000	\$44,000	\$44,000	\$176,000
Office Supplies, Postage	\$2,996	\$2,996	\$2,996	\$2,996	\$11,984
Building Maintenance Supplies and Repair	\$40,000	\$40,000	\$40,000	\$40,000	\$160,000
Printing and Reproduction	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Insurance	\$7,000	\$7,000	\$7,000	\$7,000	\$28,000
Staff Training	\$500	\$500	\$500	\$500	\$2,000
Staff Travel-(Local & Out of Town)	\$500	\$500	\$500	\$500	\$2,000
Rental of Equipment	\$500	\$500	\$500	\$500	\$2,000
<u>Food Cost</u>					
Raw Food <i>per meal \$0.17</i>	\$30,604	\$30,604	\$30,604	\$30,604	\$122,416
Cong Food Svc Supplies <i>per meal \$0.26</i>	\$46,807	\$46,807	\$46,807	\$46,807	\$187,228
Catered Meals <i>per meal \$6.27</i>	\$1,128,763	\$1,128,763	\$1,128,763	\$1,128,763	\$4,515,052
<u>Consultant</u>					
Consultant A					
<u>Other</u>					
Auto Insurance	\$9,000	\$9,000	\$9,000	\$9,000	\$36,000
Taxes/License	\$316	\$316	\$316	\$316	\$1,264
Communications	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
Vehicle Repairs & Maintenance	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Vehicle Expenses	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Total DAS Operating Expenses	\$1,388,986	\$1,388,986	\$1,388,986	\$1,388,986	\$5,555,944
Non DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities (Elec, Water, Gas, Phone, Garbage)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
<u>Food Cost</u>					
Raw Food <i>per meal \$0.13</i>	\$23,403	\$23,403	\$23,403	\$23,403	\$93,612
Cong Food Svc Supplies <i>per meal</i>					
Catered Meals <i>per meal</i>					

Consultant					
Consultant A					
Other					
Taxes/License	\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
Equipment Lease	\$500	\$500	\$500	\$500	\$2,000
Bank Charges	\$4,000	\$4,000	\$4,000	\$4,000	\$16,000
Depreciation - Bldg	\$74,512	\$74,512	\$74,512	\$74,512	\$298,048
Total Non DAS Operating Expenses	\$103,915	\$103,915	\$103,915	\$103,915	\$415,660
Total DAS and Non DAS Operating Expenses	\$1,492,901	\$1,492,901	\$1,492,901	\$1,492,901	\$5,971,604
HSA #3					10/25/2016

Program: Congregate meals for older adults (Same as Line 11 on HSA #1)			Appendix B, Page 4 Document Date: 4/14/2025				
NCQA Expenditure Detail							
DAS NCQA Expenditure	Unit price	Unit	FY 25/26	FY 26/27	FY 27/28	FY 28/29	Total
Menu planning and nutrition analysis	\$750.00 /set	2.00	\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
Kitchen and food service monitoring	\$642.00	4.00	\$2,568	\$2,568	\$2,568	\$2,568	\$10,272
Congregate site monitoring	\$295.00	44.00	\$12,980	\$12,980	\$12,980	\$12,980	\$51,920
Nutrition education	\$104.00	44.00	\$4,576	\$4,576	\$4,576	\$4,576	\$18,304
Nutrition counseling (optional)	/hour						
In-service training	\$115.00 /training	12.00	\$1,380	\$1,380	\$1,380	\$1,380	\$5,520
Total DAS NCQA Expenditure			\$23,004	\$23,004	\$23,004	\$23,004	\$92,016
Non DAS NCQA Expenditure	Unit price	Unit	FY 25/26	FY 26/27	FY 27/28	FY 28/29	Total
Menu planning and nutrition analysis	/set	2.00					
Kitchen and food service monitoring		4.00					
Congregate site monitoring		44.00					
Nutrition education		44.00					
Nutrition counseling (optional)	/hour						
In-service training	/training	12.00					
Total Non DAS NCQA Expenditure							
Total DAS and Non DAS NCQA Expenditure			\$23,004	\$23,004	\$23,004	\$23,004	\$92,016
HSA #4			10/25/2016				

Appendix C – Method of Payment

- I. In accordance with Article 5 of the Grant Agreement, payments shall be made for the unit of service rate incurred and reported for each month. Under no circumstances shall payment exceed the amount set forth in Article 5, Section 5.1 Maximum Amount of Grant Funds.
- II. Grantor will submit all bills, invoices and related documentation in the format specified by SFHSA within 15 days after the month of service to SFHSA's web-based Grants Administration, Reporting, and Billing Online (CARBON) System at: <https://grants.sfhsa.org>

Grantor may submit bills, invoices and related documentation in the format specified by SFHSA via paper or email only upon special permission by their assigned Grant Manager.
- III. Grantor must sign up to receive payments electronically via Automated Clearing House (ACH). Remittance information will be provided through Paymode-X. Additional information and sign up is available at: <https://sf.gov/get-paid-your-vendor-services>
- IV. The Executive Director or CFO must submit a letter of authorization designating specific users who will have access to CARBON to electronically submit and sign for invoices, budget revision requests, program reports, and view other information that is in CARBON.
 - A. Submittal of the invoice by designated authorized personnel with proper login credentials constitutes an electronic signature and certification of the invoice.
 - B. Authorized personnel with CARBON login credentials shall not share or internally reassign logins.
 - C. Grantor shall notify SFHSA Grant Manager immediately regarding any need for the restriction or termination of a previously authorized CARBON login.
- V. Invoices shall include actual expenditures incurred during the period of service, unless otherwise specified.
 - A. The grantor will submit a monthly invoice detailing **units of service** and amount charged. The grantor will maintain a record describing units of service and activities provided.
 - B. All charges incurred under this agreement shall be due and payable only after services have been rendered, and in no case in advance of such services.
 - C. Invoices from subgrantors (if any) for the period of service must be submitted regardless of dollar amount. If requested by SFHSA, supporting documentation must be uploaded into CARBON and submitted along with the invoice.
 - D. Grantor shall supply additional specific supporting documentation when requested by SFHSA. Supporting documentation must be uploaded into CARBON and submitted along with the invoice.
- VI. Following SFHSA verification of submitted documentation and that claimed services are authorized and delivered satisfactorily, SFHSA will authorize payment within 30 calendar days after receipt of the invoice and all billing information set forth above submitted via CARBON.
- VII. Timely Submission of Reports – If reports/documents are required, Grantor shall submit these reports prior to submitting invoices. Failure to submit required reports/documents in CARBON by specified deadlines may result in withholding of grant payments.
- VIII. If this grant agreement contains any Pass-Through funding requiring specific expense documentation from the source agency, Federal, State, Private or other then the following documentation shall also be included with each invoice submission:

Funding Agency: CFDA or other Identification #93.053:

1. Department of Health and Human Services

2. _____

3. _____

4. _____

Appendix D--Interests In Other City Grants

City Department & Program Name (list each grant separately)	Grant Term Dates	Grant Amount
Human Services Agency	FY 2025-2026	\$1,854,081
Human Services Agency	FY 2026-2027	\$1,357,532
Human Services Agency	FY 2027-2028	\$1,081,675
Human Services Agency	FY 2028-2029	\$1,081,675
Department of Disability & Aging	FY 2025-2026	\$12,900,580
Department of Disability & Aging	FY 2026-2027	\$11,501,370
Department of Disability & Aging	FY 2027-2028	\$8,216,665
Department of Disability & Aging	FY 2028-2029	\$5,821,024
Mayor's Office of Housing & Community Development	FY 2025-2026	\$307,530

Appendix E – Permitted Subcontractors

None.

Appendix F-ANNUAL SITE CHART - CONGREGATE NUTRITION SERVICES												OFFICE OF COMMUNITY PARTNERSHIPS		FY 26-29
AGENCY: Self-Help for the Elderly														
MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco CA 94111														
DIRECTOR: Karen Lam												EMAIL: karen@selfhelpelderly.org		PHONE NO.: 415-677-7603
PROGRAM MANAGER: Steven Zhong												EMAIL: stevenz@selfhelpelderly.org		PHONE NO.: 415-677-7608
Congregate Nutrition Services: Dine-in meals or To-go meals														Total ALL Sites
Population Served: Older Adults or Adults with Disabilities														
Site Name														
Address and Zip														
Phone Number														
Alternate Phone Number														
Neighborhood														
Supervisory District No.														
Bus Line #														
Site Manager/Coordinator														
Site Hours Open														
Brief description of other programming offered at site if applicable														
Hours of Scheduled Programming														
Days Open for Meal Service														
Hours of Meal Service														
Vegetarian meal option available: (Yes or No)														
Cuisine Type														
Annual # Unduplicated Consumers														
Annual Number of Meals														
Annual # Service Days per FY														
Average # meals per day														
Observed holidays														
ADA Accessible														
Nutrition Education														
Annual # Nutrition Education Sessions (4 required)														
Annual # of Participants (average # of meals x # of nutrition education sessions)														

Appendix G – Confidentiality and Privacy of Participant Information

1. In addition to the terms included in Section 12.1 of the Agreement, **Proprietary or Confidential Information of City**, Grantee agrees to further take the following steps to protect the confidentiality and privacy of information it obtains in the course of providing services under this Agreement:
 - 1.1. **Safeguards for Participant Information.** In the course of providing services to members of the public as set forth in this Agreement, Grantee may at times have access to and may collect or retain various kinds of information about people who are participating in and/or receiving services provided by Grantee based on funds received pursuant to this Agreement. Such information includes any information about a person that allows Grantee or would allow anyone else to identify that person by name or other personal characteristics, and it includes but is not limited to the following information about each program participant: name and any aliases; contact information; demographic information; physical description information; photo, video, or audio recordings of the person; medical information; employment information; financial information; and/or any information about services or benefits that person receives from any City, state, or other governmental department or program. To the extent that Grantee keeps any such information associated with people who participate in and/or receive services funded by this Agreement, Grantee must take appropriate steps to protect the confidentiality of such information and to safeguard such information from unauthorized access, use, or disclosure. Such protections must include but are not limited to administrative, physical, and technical safeguards.
 - 1.2. **Assessment of Use of Participant Information.** Grantee agrees to assess how it maintains and uses the program participant information described in Subsection 1.1 above. This assessment should include consideration of all of the following:
 - 1.2.1. How such information is protected;
 - 1.2.2. How use of such information is limited to appropriate purposes;
 - 1.2.3. How such information is stored, including how computer systems are encrypted, how cloud storage or other online services are used, and whether it is stored in data center locations outside the United States of America;
 - 1.2.4. How Grantee's employees, agents, or subcontractors are allowed to use and share such information;
 - 1.2.5. What rules apply to the distribution, sharing, or use of such information outside the services provided under this Agreement;
 - 1.2.6. How Grantee will ensure compliance with any applicable federal, state, and local laws and regulations relating to services funded by this Agreement and participant information kept by Grantee; and
 - 1.2.7. How a participant is allowed to access information held by Grantee about that participant.
 - 1.3. **Notification to City of Loss or Unauthorized Access to Participant Information; Security Breach Notification.** Grantee must comply with all applicable laws that require the notification to individuals in the event of unauthorized release of participant information or other event requiring notification. Regardless of all other such laws and obligations, Grantee

must notify City of any actual, suspected, or potential exposure or misappropriation of participant information (any “Leak”) within seventy-two (72) hours of the discovery of such. Grantee, at its own expense, will reasonably cooperate with law enforcement authorities to investigate any such Leak and to notify injured or potentially injured parties. The obligation to notify the City expressly includes any suspected or potential Leak and not just a confirmed Leak. City retains the sole right to conduct media communications related to such Leak on its own behalf, and Grantee may not communicate with the media on behalf of the City in relation to such Leak. Grantee is also required to use all reasonable efforts to coordinate its response to such Leak with City.

Notifications to City must be made via email to:

San Francisco Human Services Agency Privacy Office: HSAPrivacyOffice@sfgov.org

Information Security Office: HSA.IT.Information.Security@sfgov.org

Appendix F- Federal Award Information for Subrecipients

	E	F	G	H	I	J	K	L	M	N	O	P
	Service	Assistance Listing (CFDA)	Assistance Listing (CFDA) Program Title	Other Name, if any	Federal awarding agency	Known (and anticipated) Federal Prime Award Numbers and Award periods	Known Federal Award Date	Federal Award Project Description (from Pass-Through)	Pass-Through Agency (from Federal to CCSF), if applicable	Known (and anticipated) Pass-Through Award Identifying Information and Award periods	Federal award amount, Actual (and Anticipated) to CCSF*	Research & Development Award?
8												
130	ENP Congregate Meals (Self-Help for the Elderly)	93.053	Nutrition Services Incentive Program		Department of Health and Human Services - Administration for Community Living	17AACANSIP for 10/1/2016 - 9/30/2017 18AACANSIP for 10/1/2017 - 9/30/2018 1901CAOANS-00 for 10/1/2018 - 9/30/2019 2001CAOANS-00 for 10/1/2019 - 9/30/2020 21AACANSIP for 10/1/2020 - 9/30/2021 22AACANSIP for 10/1/2021 - 9/30/2022	Not available at this time	This program is to reward effective performance by States and Tribes in the efficient delivery of nutritious meals to older adults through the use of cash or USDA Foods.	California Department of Aging	AP-1617-06 for 7/1/2016 - 6/30/2017 AP-1718-06 for 7/1/2017 - 6/30/2018 AP-1819-06 for 7/1/2018 - 6/30/2019 AP-1920-06 for 7/1/2019 - 6/30/2020 AP-2021-06 for 7/1/2020 - 6/30/2021 AP-2122-06 for 7/1/2021 - 6/30/2022	\$541,576 for 7/1/2015 - 6/30/2016 \$527,485 for 7/1/2016 - 6/30/2017 \$506,121 for 7/1/2017 - 6/30/2018 \$629,722 for 7/1/2018 - 6/30/2019 \$699,344 for 7/1/2019 - 6/30/2020 \$697,936 for 7/1/2020 - 6/30/2021 Anticipating similar amount in future years	No

Appendix I

Federal Requirements for Subrecipients: Provisions for All Federal Funds Subawards and Matching Funds to Federal Funds

I. Definitions

These are Federal definitions that come from Federal Uniform Guidance, 2 CFR Part 200, and are in addition to and may vary from definitions provided in the City's Grant Agreement, Grant Amendment, and Professional Services Agreement documents.

A. City means the City and County of San Francisco.

B. Subaward means an award provided by a pass-through entity (e.g. the City) to a **Subrecipient** for the Subrecipient to carry out all or part of a Federal award. It does not include payments to an individual that is a beneficiary of a Federal program (2 CFR §200.92). Characteristics of Subawards, as opposed to Subcontracts, include but are not limited to that a Subrecipient

- i. Has programmatic decision-making responsibility within the Scope of Services of the agreement
- ii. May determine client eligibility for the federal program
- iii. In accordance with its agreement, uses the Federal funds to carry out all or part of Federal a program, as opposed to providing goods or services to help the City administer the Federal program.
- iv. See 2 CFR §200.330 for more guidance.

C. Third Party Subaward means a Subaward at any tier entered into by a Subrecipient, financed in whole or in part with Federal assistance originally derived from the Federal awarding agency.

D. Contract and/or Subcontract means a legal instrument by which a non-Federal entity purchases property or services needed to carry out the project or program under a Federal award (2 CFR §200.22). Characteristics of Subcontracts, as opposed to Subawards, include but are not limited that to a **Subcontractor**

- i. Has little or no programmatic decision-making responsibility in how it carries out the purpose of the Contract
- ii. Does not determine client eligibility for the federal program
- iii. Provides goods or services that are ancillary to the operation of the Federal program and/or that help the City administer the Federal program.
- iv. See 2 CFR §200.330 for more guidance.

E. Third Party Subcontract means a Subcontract at any tier entered into by Contractor or Subcontractor, financed in whole or in part with Federal assistance originally derived from the Federal awarding agency.

II. Federal Changes

- A. Subrecipient shall at all times comply with all applicable regulations, policies, procedures and Federal awarding agency directives, including without limitation those listed directly or by reference in the Master Agreement between the City and the Federal awarding agency or in the Grant Program Guidelines, as they may be amended or promulgated from time to time during the term of this Agreement. Subrecipient's failure to so comply shall constitute a material breach of this agreement.

III. Requirements for Pass-Through Entities (2 CFR §200.331)

- A. For any Third Party Subawards that the Subrecipient enters into in the course of carrying out this agreement the Subrecipient shall include
 - i. Federal award information as specified in 2 CFR §200.331(a)(1) to the best of its knowledge.
 - ii. Requirements imposed by the Federal awarding agency, the City, or itself in order to meet its own responsibility to the City under this Subaward.
 - iii. An approved federally recognized indirect cost rate negotiated between the Subrecipient and the Federal Government or. If no such rate exists, either a rate negotiated between the Subrecipient and its Third Party Subrecipients, or a de minimis indirect cost rate as defined in §200.414 Indirect (F&A) costs, paragraph (f);
 - iv. A requirement that the Third Party Subrecipient permit the Subrecipient, the City, higher level funders, and auditors to have access to the Subrecipient's records and financial statements as necessary for the Subrecipient to meet the requirements of this part; and
 - v. Appropriate terms and conditions concerning closeout of the Subaward.
- B. For any Third Party Subawards that the Subrecipient enters into in the course of carrying out this agreement, the Subrecipient agrees to
 - i. Evaluate each Third Party Subrecipient's risk of noncompliance with Federal statutes, regulations, and the terms and conditions of the Subaward for purposes of determining the appropriate Subrecipient monitoring described in paragraphs (iii) of this section,
 - ii. Consider imposing specific Subaward conditions upon a Third Party Subrecipient if appropriate as described in 2 CFR §200.207 Specific conditions.
 - iii. Monitor the activities of the Third Party Subrecipient as necessary to ensure that the Subaward is used for authorized purposes, in compliance with Federal statutes, regulations, and the terms and conditions of the Subaward; and that Subaward performance goals are achieved. See 2 CFR §200.331(d) and (e) for specific requirements.

- iv. Verify that every Third Party Subrecipient is audited as required by 2 CFR §200 Subpart F—Audit Requirements of this part when it is expected that the Subrecipient's Federal awards expended during the respective fiscal year equaled or exceeded the threshold set forth in 2 CFR §200.501 Audit requirements.
- v. Consider whether the results of the Third Party Subrecipient's audits, on-site reviews, or other monitoring indicate conditions that necessitate adjustments to the pass-through entity's own records.
- vi. Consider taking enforcement action against noncompliant Third Party Subrecipients as described in 2 CFR §200.338 Remedies for noncompliance of this part and in program regulations.

IV. Procurement Compliance *(2 CFR §200.318 through .326)*

- A. Subrecipient agrees to comply with the procurement standards set forth in 2 CFR § 200.318 through § 200.326. This includes but is not limited to the following
- B. General procurement standards, including using its documented procurement procedures which reflect all applicable laws, regulations, and standards; maintaining oversight of contractors; maintaining written standards of conflict covering conflicts of interest and organizational conflicts of interest; avoiding acquisition of duplicative items; awarding contracts only to responsible contractors possessing the ability perform the terms and conditions of the proposed procurement successfully; and maintaining records sufficient to detail the history of procurements.
- C. Providing full and open competition as per 2 CFR § 200.319
- D. Complying with standards of the five methods of procurement described in 2 CFR § 200.320: micro-purchases, small purchases, sealed bids (formal advertising), competitive proposals, and non-competitive (sole source) proposals.

V. Cost Principles Compliance *(2 CFR §200 Subpart E)*

- A. Subrecipient agrees to comply with the Cost Principle specified in 2 CFR § 200 Subpart E for all costs that are allowable and included in this agreement with the City. This includes but is not limited to compliance with the following
- B. §200.430 Compensation – personal services, including §200.430(i) regarding Standards for Documentation for Personnel Expense. Charges to Federal awards for salaries and wages must be based on records that accurately reflect the actual work performed. The requirements for these records include but are not limited to that they
 - i. Be supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated;
 - ii. Be incorporated into the official records of the Subrecipient;
 - iii. Reasonably reflect the total activity for which the employee is compensated by the Subrecipient, not exceeding 100% of compensated activities;

- iv. Encompass both federally assisted and all other activities compensated by the Subrecipient on an integrated basis, but may include the use of subsidiary records as defined in the Subrecipient's written policy;
- v. Comply with the established accounting policies and practices of the Subrecipient;
- vi. Support the distribution of the employee's salary or wages among specific activities or cost objectives if the employee works on more than one Federal award; a Federal award and non-Federal award; an indirect cost activity and a direct cost activity; two or more indirect activities which are allocated using different allocation bases; or an unallowable activity and a direct or indirect cost activity.
- vii. Budget estimates alone do not qualify as support for charges to Federal awards, but may be used for interim accounting purposes in certain conditions (see §200.430(i)(1)(viii)).
- viii. In accordance with Department of Labor regulations implementing the Fair Labor Standards Act (FLSA) (29 CFR part 516), charges for the salaries and wages of nonexempt employees, in addition to the supporting documentation described in this section, must also be supported by records indicating the total number of hours worked each day.
- ix. Salaries and wages of employees used in meeting cost sharing or matching requirements on Federal awards must be supported in the same manner as salaries and wages claimed for reimbursement from Federal awards.
- x. A Subrecipient whose the records may not meet the standards described in this section shall use personnel activity reports (also known as time studies), prescribed certifications for employees working 100% on the same Federal program, or equivalent documentation as supporting documentation.

VI. Equal Employment Opportunity Compliance *(applicable to all construction agreements awarded in excess of \$10,000 by grantees and their contractors or subgrantees; 2 CFR §200 Appendix II(c))*

Subrecipient agrees to comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity," as amended by Executive Order 11375 of October 13, 1967, and as supplemented in Department of Labor regulations (41 CFR Part 60).

VII. Davis-Bacon Act Compliance *(applicable to construction agreements in excess of \$2,000 awarded by grantees and subgrantees when required by Federal grant program legislation; 2 CFR §200 Appendix II(d))*

Subrecipient agrees to comply with the Davis-Bacon Act (40 U.S.C. 3141-3418) as supplemented by Department of Labor regulations (29 CFR Part 5).

VIII. Copeland Anti-Kickback Act Compliance *(applicable to construction agreements in excess of \$2,000 awarded by grantees and subgrantees when required by Federal grant program legislation; 2 CFR §200 Appendix II(d))*

Subrecipient agrees to comply with the Copeland “Anti-Kickback” Act (40 U.S.C. 3145) as supplemented in Department of Labor regulations (29 CFR Part 3).

IX. Contract Work Hours and Safety Standards *(applicable to all agreements awarded by grantees and subgrantees in excess of \$100,000, which involve the employment of mechanics or laborers; 2 CFR §200 Appendix II(e))*

- A. Compliance:** Subrecipient agrees that it shall comply with Sections 3702 and 3704 of the Contract Work Hours and Safety Standards Act (40 U.S.C. 3701–3708) as supplemented by Department of Labor regulations (29 CFR Part 5), which are incorporated herein.
- B. Overtime:** No Subrecipient contracting for any part of the work under this Agreement which may require or involve the employment of laborers or mechanics shall require or permit any such laborer or mechanic in any workweek in which he or she is employed on such work to work in excess of forty hours in such workweek unless such laborer or mechanic receives compensation at a rate not less than one and one-half times the basic rate of pay for all hours worked in excess of forty hours in such workweek.
- C. Violation; liability for unpaid wages; liquidated damages:** In the event of any violation of the provisions of Paragraph B, the Subrecipient and any Subcontractor responsible therefore shall be liable to any affected employee for his unpaid wages. In additions, such Contractor and Subcontractor shall be liable to the United States for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic employed in violation of the provisions of paragraph B in the sum of \$10 for each calendar day on which such employee was required or permitted to be employed on such work in excess of eight hours or in excess of his standard workweek of forty hours without payment of the overtime wages required by paragraph B.
- D. Withholding for unpaid wages and liquidated damages:** The City shall upon its own action or upon written request of an authorized representative of the Department of Labor withhold or cause to be withheld, from any moneys payable on account of work performed by the Subrecipient or Subcontractor under any such Contract or any other Federal Contract with the same Prime Contractor, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same Prime Contractor, such sums as may be determined to be necessary to satisfy any liabilities of such contractor or subcontractor for unpaid wages and liquidated damages as provided in the clause set for in paragraph C of this section.

X. Notice of Requirements Pertaining to Intangible Property, Copyrights, Inventions, and Freedom of Information Act Requests *(2 CFR §200 Appendix II(f) and 2 CFR §200.315)*

- A.** Title to intangible property (see 2 CFR §200.59 Intangible property) acquired under a Federal award vests upon acquisition in the Subrecipient unless otherwise detailed

elsewhere in this agreement. The Subrecipient must use that property for the originally-authorized purpose, and must not encumber the property without approval of the Federal awarding agency. When no longer needed for the originally authorized purpose, disposition of the intangible property must occur in accordance with the provisions in 2 CFR §200.313 Equipment paragraph (e).

- B. The Subrecipient may copyright any work that is subject to copyright and was developed, or for which ownership was acquired, under a Federal award. The Federal awarding agency reserves a royalty-free, nonexclusive and irrevocable right to reproduce, publish, or otherwise use the work for Federal purposes, and to authorize others to do so.
- C. The Subrecipient is subject to applicable regulations governing patents and inventions, including government-wide regulations issued by the Department of Commerce at 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Awards, Contracts and Cooperative Agreements.”
- D. The Federal Government has the right to obtain, reproduce, publish, or otherwise use the data produced under a Federal award; and authorize others to receive, reproduce, publish, or otherwise use such data for Federal purposes.
- E. The Subrecipient shall comply with Freedom of Information Act (FOIA) requests passed down from the Federal government to the City.

XI. Debarment and Suspension *(applicable to all contracts and subcontracts; 2 CFR §200 Appendix II(h))*

- A. Subrecipient represents and warrants that it is not
 - (1) Debarred nor suspended from federal financial assistance programs and activities
 - (2) Proposed for debarment
 - (3) Declared ineligible
 - (4) Voluntarily excluded from participation in covered transactions by any federal department or agency.
- B. Subrecipient agrees that neither Subrecipient nor any of its Third Party Subrecipients or Subcontractors shall enter into any third party Subawards or Subcontracts for any of the work under this Agreement with a third party who is debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs as specified above. 2 CFR §180.220.
 - (1) Subrecipient and Third Party Subrecipients and Subcontractors can meet this requirement with lower level entities by requiring they sign a certification to its effect and/or including such a clause in their contracts/agreements with the lower level entities. It is also required to check those entities’ status at the System for Award Management (SAM) at www.sam.gov under Search Records prior to awarding the funds and/or establishing the agreement and also on a regular, but at least annual, basis. To ensure accuracy of the verification, Subrecipient should use the lower level entity’s exact name and Unique Entity Identifier (UEI, formerly

known as Data Universal Numbering System number) or Social Security Number or Tax Identification Number (TIN) to perform the query. A copy of the query should be printed and kept on file in case of a review by county staff or funding agencies.

XII. Byrd Anti-Lobbying Certification *(applicable for Subawards or Subcontracts in excess of \$100,000; 2 CFR §200 Appendix II(i) and by inclusion, 45 CFR Part 93)*

A. Subrecipient hereby certifies, to the best of his or her knowledge and belief, that

- i. No Federal appropriated funds have been paid or will be paid, by or on behalf of the person signing this agreement, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal award or contract, the making of any Federal grant or contract, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
- ii. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit, with its offer, OMB Standard Form LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
- iii. The person signing this agreement shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loan, and cooperative agreements) and require that all recipients of such awards in excess of \$100,000 shall certify and disclose accordingly.

- B.** This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is imposed by section 1352, title 31, U.S. Code. Any person making an expenditure prohibited under this provision or who fails to file or amend the disclosure form shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

XIII. Single Audit Requirements

Subrecipient shall comply in all respects with 2 CFR §200 Subpart F – Audit Requirements. The Federal expenditures spent under this agreement shall be counted toward the \$750,000 threshold of Federal award expenditures for a Single Audit.

Subrecipient shall, upon request of the Human Services Agency, submit a copy of the Single Audit within thirty (30) days after receipt of the Auditor's report, or nine (9) months after the

end of the audit period, whichever occurs first, or unless a longer period is agreed to in advance by the cognizant or oversight federal agency.

XIV. Incorporation of Uniform Administrative Requirements and Exceptions from Federal Awarding Agencies

- A.** The preceding provisions include, in part, certain standard terms and conditions required by the Federal awarding agency, whether or not expressly set forth in the preceding agreement provisions. All provisions required by the Federal awarding agency, as set forth in 2 CFR Part 200, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all of the Federal awarding agency's mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Agreement. Subrecipient shall not perform any act, fail to perform any act, or refuse to comply with any City requests that would cause City to be in violation of the Federal awarding agency's terms and conditions.
- B.** Further, all provisions of each Federal Awarding Agency's incorporation of the Uniform Guidance are also hereby incorporated as reference.
 - i. US Health and Human Services: 45 CFR Part 75 (includes some exceptions and additions)
 - ii. US Department of Housing and Urban Development: (no exceptions or additions)
 - iii. US Department of Education: (no exceptions).
 - iv. US Department of Agriculture: 2 CFR Part 400

XV. Inclusion of Federal Requirements in Third Party Subawards and Subcontracts

Subrecipient agrees to include all of the above clauses in each Third Party Subaward and Subcontract (Subcontracts shall exclude Requirements for Pass-Through Entities) financed in whole or in part with Federal assistance provided by the Federal awarding agency, unless the third party agreements do not meet the dollar thresholds indicated.

**City and County of San Francisco
Human Services Agency**

**Request for Proposals (RFP 1177) for
Nutrition Services for Older Adults
and Adults with Disabilities:**

- 1. Congregate meal program for older adults and adult with disabilities**
- 2. To-go meal program for older adults and adults with disabilities**
- 3. Choosing Healthy Appetizing Meal Plan Solutions for Seniors
(CHAMPSS) Congregate Meal Program**
- 4. Home-delivered meal program for older adults and adults with disabilities**
 - 5. Citywide emergency home-delivered meal program**
 - 6. Culturally responsive supplemental grocery program**



Request for Proposals Issued:
Pre-Proposal Conference:
Deadline to Submit Proposals:

December 31, 2024
January 10, 2025
February 24, 2025

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- Attachment 2: Budget Forms
- Attachment 3: Site Chart
- Attachment 4: DAS Disability Checklist
- Attachment 5: Menu Compliance Template

I. INTRODUCTION AND SOLICITATION SCHEDULE

A. Introduction

1. General

The San Francisco Human Services Agency (SFHSA) and the Department of Disability and Aging Services (DAS) announces their intent to seek proposals from nonprofit organizations to provide nutrition services for older adults and adults with disabilities. These programs are designed to reduce hunger, food insecurity, and malnutrition while promoting overall health and well-being for these populations. Through this Request for Proposals (RFP), DAS aims to ensure equitable access to high-quality nutrition services that meet the diverse needs of San Francisco's older adults and adults with disabilities.

This Request for Proposals (RFP) is for nutrition service programming under the Older Americans Act (OAA) Nutrition Program, the Older Californians Nutrition Program (OCNP), and local nutrition programs for older adults and adults with disabilities. The following nutrition service programs are included in this RFP:

1. Congregate meal program for older adults and adults with disabilities
2. To-go meal program for older adults and adults with disabilities
3. Choosing Healthy Appetizing Meal Plan Solutions for Seniors (CHAMPSS) – congregate meal program
4. Home-delivered meal program for older adults and adults with disabilities
5. Citywide emergency home-delivered meal program
6. Culturally responsive supplemental grocery program

DAS has allocated funding for these programs based on current service provision, the Dignity Fund Community Needs Assessment, and the Service and Allocation Plan for FY 2023-24 through FY 2026-27. Multiple grants will be awarded to support the nutrition service programs outlined in this solicitation.

This procurement is for existing programs. Agencies awarded new grants will be required to collaborate with DAS in developing a comprehensive transition plan, if necessary. This plan is essential to ensuring service continuity for current consumers when the new grant period begins. Successful bidders will work closely with DAS to facilitate a smooth transition and minimize any disruptions to service delivery.

2. Background

The Department of Disability and Aging Services (DAS) is a state-designated Area Agency on Aging under the Older Americans Act (OAA) and the Older Californians Act (OCA). These acts primarily provide services, support, and protections for individuals aged 60 and older, with a focus on supporting those who are socially or economically disadvantaged. In addition to serving older adults, DAS also provides community-based services for adults with disabilities.

One of the core services offered under the OAA, OCA, and administered by DAS is nutrition services. These include congregate, home-delivered, and to-go meal programs, along with nutrition education, nutrition risk screenings, and supplemental food programs at the local level. DAS supports these services to enhance the quality of life, promote health, and foster independence for older adults and adults with disabilities.

Older adults and individuals with disabilities face heightened risks of food insecurity due to factors like fixed incomes and mobility limitations. Rising healthcare costs further strain their financial resources, making it difficult to afford nutritious meals. Mobility challenges can also restrict access to healthy food, increasing the risk of malnutrition and related health issues such

as chronic diseases. This can threaten their independence and well-being, especially for low-income individuals.

To address these challenges, DAS funds nutrition support programs designed to alleviate food insecurity and improve the health and well-being of these populations. These programs prioritize providing nutritious, culturally relevant, and accessible food resources. By addressing critical nutritional needs, DAS initiatives help prevent malnutrition, reduce illness vulnerability, and decrease reliance on emergency health services, ultimately promoting independence and improving quality of life.

The congregate, home-delivered, and to-go meal programs are key components of DAS's efforts to combat food insecurity. Congregate nutrition services provide older adults and adults with disabilities not only with nutritious meals but also with opportunities for social engagement, which are crucial for mental and emotional well-being. Home-delivered meal services ensure that those who are homebound or unable to visit community sites still have access to balanced, nutritious meals.

In addition, DAS offers a culturally responsive supplemental grocery program, providing extra food support for individuals who can cook at home. This program tailors grocery offerings to meet the cultural preferences and dietary needs of specific populations, ensuring that the food provided is both familiar and appropriate. By catering to diverse food traditions, this program empowers participants to prepare balanced, culturally relevant meals at home, supporting their independence.

These nutrition programs not only meet immediate food needs but also connect participants with additional community resources, creating a comprehensive approach to addressing food insecurity. Through continued investment in these services, DAS is working to build a healthier, more inclusive community for older adults and individuals with disabilities.

3. Diversity, Inclusion, and Racial Equity

The San Francisco Human Services Agency (SFHSA) and the Department of Disability and Aging Services (DAS) are committed to a culture of inclusion in which our differences are celebrated. Everyone should have what they need to thrive no matter their race, age, ability, gender, sexual orientation, ethnicity, or country of origin. The SFHSA and DAS believe that a diverse and inclusive workforce will produce more creative and innovative outcomes for the organization, and ultimately, its clients.

SFHSA and DAS are committed to combating systemic racism and disparate impact of governmental services by advancing racial equity in all aspects of our work, ensuring access to services and providing support to communities to ensure their ability to succeed and thrive.

SFHSA and DAS seek to partner with community-based organizations that share these values in their organizational culture and program services. The agency sees our contracted community-based partners and their work as a means to enhance and further advance efforts to address racial equity and inclusion across San Francisco.

Respondents to this request for proposals must ensure that they clearly demonstrate how these values are exemplified through their organizational and program operations. This should include

a description of the organization's plans, strategies, and activities to address racial equity and inclusion among staff and program participants, as well as internal controls to regularly review current practices through the lens of racial equity and inclusion to identify areas of improvement.

Additional examples of information to be provided are: the organizational mission or inclusion statements, non-discrimination documents, and/or other supporting documents, community outreach plans, staff training activities on racial equity, and a description of or data on the demographics of staff and program participants.

4. Selection Overview

The City shall award a grant to multiple Proposers that meet the Minimum Qualifications of this Solicitation and obtain the highest-ranking scores. Responsive Proposals will be evaluated by a panel ("Evaluation Panel") consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined herein.

A SEPARATE proposal is required for each type of nutrition service:

1. Congregate nutrition services for older adults. (Nutrition compliance and quality assurance components are required. Respondent should address NCQA components in each proposal submitted and include NCQA components in corresponding budgets.)
2. Congregate nutrition services for adults with disabilities. (Nutrition compliance and quality assurance components are required. Respondent should address NCQA components in each proposal submitted and include NCQA components in corresponding budgets.)
3. To-go meal nutrition services for older adults. (Nutrition compliance and quality assurance components are required. Respondent should address NCQA components in each proposal submitted and include NCQA components in corresponding budgets.)
4. To-go meal nutrition services for adults with disabilities. (Nutrition compliance and quality assurance components are required. Respondent should address NCQA components in each proposal submitted and include NCQA components in corresponding budgets.)
5. Choosing Healthy Appetizing Meal Plan Solutions for Seniors (CHAMPSS) (Nutrition compliance and quality assurance components are required. Respondent should address NCQA components in each proposal submitted and include NCQA components in corresponding budgets.)
6. Home-delivered nutrition services for older adults. (Nutrition compliance and quality assurance components are required. Respondent should address NCQA components in each proposal submitted and include NCQA components in corresponding budgets.)
7. Home-delivered nutrition services for adults with disabilities. (Nutrition compliance and quality assurance components are required. Respondent should address NCQA components in each proposal submitted and include NCQA components in corresponding budgets.)
8. Citywide emergency home-delivered meal program
9. Culturally responsive supplemental grocery program

Respondents do NOT need to submit a separate proposal if bidding on multiple districts or cuisine types within the same nutrition service area. Proposals will only compete against other proposals applying for the same type of nutrition services.

Nutrition compliance and quality assurance (NCQA) components are required for congregate nutrition services and home-delivered meal services.

B. Anticipated Term

A grant awarded pursuant to this Solicitation shall have a tentative term of four (4) years from July 1, 2025, to June 30, 2029, subject to annual availability of funds, annual satisfactory of grantee performance, and need. SFHSA reserves the right to enter into grants of a shorter duration.

C. Anticipated Not to Exceed Amount

The total estimated annual funding for this RFP is approximately \$29,376,968 per year, which may increase or decrease depending on funding availability. See Table below for breakdown. **The funding amounts listed in this RFP are anticipated initial funding awards, based on current budget availability.** The source of funding for these services is state, federal and local funds. Funding for this RFP may include California Department of Aging (CDA) funds. If so, grantees will be required to follow CDA rules and regulations referenced in Section VIII.F. Actual awards will be determined by the number of responsive proposals that meet the Department's strategies and objectives, and funding may be less or more. **Please submit budget requests according to the limits in this RFP,** however, SFHSA and DAS may negotiate different funding allocations, grant terms, and project goals before finalizing awards. Should additional funding become available, award amounts may be increased significantly beyond the originally anticipated amount at a level commensurate to the details in the RFP.

Table 1 below identifies the estimated annual funding for the nutrition services sought through this RFP, including the required Nutrition Compliance and Quality Assurance (NCQA) components for relevant programs. Tables 2 and 3 provide additional details on the anticipated funding by supervisorial district and cuisine type for congregate and home-delivered nutrition services.

Table 1 Nutrition Services	Estimated Funding Amount
Congregate Nutrition Services for Older Adults (OCNP, Dine-in meals-C1 and To-go meals-C2)	\$10,415,344
Congregate Nutrition Services for Adults with Disabilities (Dine-in and To-go meals)	\$1,402,974
Congregate Nutrition Services CHAMPSS - Choosing Healthy Appetizing Meal Plan Solutions for Seniors (OCNP, Dine-in meals-C1)	\$802, 064
Nutrition Compliance and Quality Assurance for Congregate Nutrition Services	\$158,146
Home-Delivered Nutrition Services for Older Adults (OCNP-C2)	\$12,540,616
Home-Delivered Nutrition Services for Adults with Disabilities	\$1,772,350
Citywide Emergency Home-Delivered Nutrition Services for Older Adults and Adults with Disabilities	\$197,875

Nutrition Compliance and Quality Assurance for Home-Delivered Nutrition Services, including nutrition service assessments and nutrition service reassessments	\$1,942,572
Culturally Responsive Supplemental Grocery Program	\$145,027
Total Estimated Funding Amount	\$29,376,968

Table 2 Congregate Nutrition Services											
Supervisory District	D1	D2	D3	D4	D5	D6	D7	D8	D9	D10	D11
Total for Older Adults	\$866,837	\$805,807	\$1,330,503	\$547,843	\$3,020,950	\$1,024,074	\$590,840	\$488,004	\$652,292	\$1,153,944	\$736,315
<i>Cuisine Type</i>											
Multicultural/Other	\$138,694	\$185,336	\$518,896		\$996,913	\$460,833	\$153,618	\$488,004	\$45,660	\$334,644	\$404,973
American- Latiné		\$88,639				\$317,463			\$593,585		
American-Southern					\$815,656					\$703,906	
Chinese	\$485,429		\$811,607	\$416,361		\$245,778	\$171,344			\$115,394	\$169,353
CHAMPSS	\$242,714			\$131,482			\$265,878				\$161,989
Japanese					\$573,980						
Russian		\$531,833									
Multicultural-Breakfast					\$634,399						
American- Latiné Breakfast									\$13,046		
Supervisory District	D1	D2	D3	D4	D5	D6	D7	D8	D9	D10	D11
Total for Adults with Disabilities	\$14,079	\$74,579	\$93,265	\$2,030	\$371,928	\$281,677	\$157,677	\$11,680	\$174,115	\$143,261	\$78,681
<i>Cuisine Type</i>											
Multicultural/Other	\$11,686	\$5,966	\$85,804		\$223,157	\$95,770	\$157,677	\$11,680		\$12,894	\$76,321
American- Latiné		\$29,086				\$183,090			\$160,186		
American-Southern					\$111,579					\$128,935	
Chinese	\$2,393		\$7,461	\$2,030		\$2,817				\$1,433	\$2,360
Russian		\$39,527									
Multicultural-Breakfast					\$37,193						
American- Latiné Breakfast									\$13,929		
NCQA Funding for Congregate Nutrition Services											
\$158,146											

Table 3 Home-Delivered Nutrition Services	
Older Adults by Type of Cuisine	
Multicultural/Other	\$8,641,498
American- Latiné	\$386,749
Chinese	\$2,496,885
Japanese	\$450,003
Kosher	\$105,796
Russian	\$409,385
Vegetarian	\$50,000
Adults with Disabilities by Type of Cuisine	
Multicultural/Other	\$1,744,668
Vegetarian	50,000
Emergency HDM Program for Older Adults and Adults with Disabilities	\$197,875
NCQA Funding for HDM Nutrition Services, including initial and annual assessments	\$1,942,572

Culturally Responsive Supplemental Grocery Program		
District 9	Latiné community	\$38,532
District 10	Black/African American community	\$106,495

DAS and SFHSA will award funding for each type of nutrition service by supervisorial district and/or cultural cuisine, whichever applicable. Actual funding amounts may vary depending on the number and quality of bid responses received, previous service delivery in the districts, and the evolving needs of DAS consumers in the community.

Only for Nonprofits: SFHSA will add Cost of doing business (CODB) escalators to reflect the approved City Budget to the awarded annual amount set forth by the Controller's Office Indexed Rate after contract award. CODB may be adjusted annually as authorized by the San Francisco Board of Supervisors. For the purpose of this solicitation, proposers should submit a flat annual budget that is listed in the prior paragraph. Proposers acknowledges that City budget decisions are subject to the discretion of its Mayor and Board of Supervisors and it is not entitled to CODB. Proposers assumes all risk of possible non-appropriation or non-certification of funds. For more information regarding the Controller's Policy on Multi-Year Contracting with Inflation Rates for Nonprofit Suppliers Issued:

<https://openbook.sfgov.org/webreports/details3.aspx?id=3366>

All decisions regarding the size, length, and scope of future funding awards are subject to SFHSA and DAS approval and budget availability. Some of the service areas may not be funded initially, but the Departments may award unfunded proposals within the term of this RFP if funds become available that align with the services proposed. Future funding is not guaranteed, and funding amounts and terms will depend upon the performance of the grantee during the initial

award period, as well as other policy considerations as determined by SFHSA and DAS. SFHSA and DAS reserves the right, in its sole discretion, to not renew funding awards.

D. Cooperative Agreement

Any other City department, public entity or nonprofit made up of multiple public entities, may use the results of this Solicitation to obtain some or all of the commodities or services to be provided by proposer under the same terms and conditions of any grant awarded pursuant to this Solicitation.

E. Solicitation Schedule

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change.

Proposal Phase	Tentative Date
Request for Proposals Issued	December 31, 2024
Pre-Proposal Conference (virtual)	January 10, 2025 at 1 pm
Letter of Intent Deadline	January 17, 2025 at 3:00pm
Deadline for Written Questions	January 14, 2025 at 3:00pm
Deadline to Submit Proposals	February 24, 2025 at 3:00pm
Tentative Evaluation of Proposals	March 7, 2025
Tentative Notice of Award	March 14, 2025
Tentative Date Services are to Begin	July 1, 2025

F. Definitions (include the following as applicable; add more as needed)

Adult with a Disability	A person 18-59 years of age with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living: eating, dressing, transfer, bathing, toileting, grooming; or 2) or a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living: preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing Online System
CCR-Title 22	California Code of Regulations, Title 22, Social Security, Division 1.8. California Department of Aging.
CDA	California Department of Aging.
CFR	Code of Federal Regulations
CHAMPSS	Choosing Healthy Appetizing Meal Plan Solutions for Seniors
City	City and County of San Francisco, a municipal corporation.

Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
Congregate Site Monitoring	Onsite monitoring of nutrition services at a congregate meal site, conducted and documented by a qualified staff member who has, at a minimum, received training from a food safety manager or a Registered Dietitian (RD) / Registered Dietitian Nutritionist (RDN).
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
DAS Benefits and Resources Hub	A unit within DAS that is equipped to receive calls from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations. https://www.sfhsa.org/contact-us/locations/das-benefits-and-resources-hub
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
Dietary Guidelines for Americans (DGA)	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	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Food Security Screening	A two-question validated screening tool designed to assess an individual's food security status.
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)

HACCP Central Kitchen & Food Service Monitoring	An on-site HACCP safety and sanitation monitoring of the production/central kitchen conducted and document in writing by a Registered Dietitian (RD) or Registered Dietitian Nutritionist (RDN).
HDM Route Monitoring	An on-site review of a home-delivered meal (HDM) delivery route, from the initial packing of meals to delivery to consumers, conducted and documented by a qualified staff member who has, at a minimum, received training from a food safety manager or a Registered Dietitian (RD) / Registered Dietitian Nutritionist (RDN).
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender nonbinary.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language.
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 program enrollment and participation is not means tested. Consumers self-report income status.
Menu Planning and Analysis	The process of developing a menu that spans a minimum of four (4) weeks and complies with the Dietary Guidelines for Americans as well as CDA's Older Californians Nutrition Program Menu Guidance. A registered dietitian conducts the menu analysis, ensuring that the menu meets the required standards and nutritional guidelines for the meals.
NCQA	Nutrition Compliance and Quality Assurance refers to the processes and actions integral to maintaining high standards in congregate and home-delivered nutrition services. These components are required programmatically and vary depending on the type of nutrition services provided. Examples include but are not limited to: staff/volunteer training, menu planning and nutrient analysis, nutrition education, consumer assessments and reassessments for home-delivered and to-go meal nutrition services.
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 Session	An intervention targeting participants and caregivers that uses information dissemination, instruction, or training with the intent to support food, nutrition, and physical activity choices and behaviors (related to nutritional status) to maintain or improve health and address nutrition-related conditions. Content is consistent with the DGA; accurate, culturally sensitive, regionally appropriate, and considers personal preferences; and overseen by a registered dietitian. (CDA Program Memo 21-23)

Nutrition Services	The provision of meals, which must comply with the Dietary Guidelines for Americans, to eligible consumers in a group setting (congregate meal program-C1), delivered to their home (home-delivered meal program-C2), or picked up by an eligible consumer from a community site without congregating (to-go meal program-C2). Nutrition services also include nutrition education and nutrition risk screening.
Nutrition Service Assessment	An assessment conducted by a qualified staff member within two weeks of receiving a home-delivered or to-go meal and annually thereafter that documents the need for service and that the type of meal is appropriate for the participant in their living environment. The assessment covers physiological, socioeconomic, and psychological factors including acute or chronic disease, syndromes or conditions, family/support system and functional ability including activities of daily living (ADL) and instrumental activities of daily living (IADL) which contribute to an individual's need for meals and other related services. (CCR Title 22 Sec. 7638.3)
Nutrition Service Reassessment	A reassessment conducted quarterly by qualified staff that documents the need for home-delivered meals or to-go meals. (CCR Title 22 Sec. 7638.3) Initial and annual assessments count towards the quarterly reassessment requirement.
OCM	Office of Contract Management, San Francisco Human Services Agency.
OCNP	Older Californians Nutrition Program is the state-administered program that operates under the federal Older Americans Act (OAA) and is managed by the California Department of Aging (CDA). The program provides nutrition services, congregate (C1) and home-delivered (C2) to older adults aged 60 and over.
OCNP Menu Guidance	A document issued by the California Department of Aging, Nutrition and Wellness Bureau, intended to provide guidance on the application of the Dietary Guidelines for Americans within the Older Californians Nutrition Program.
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OAA	Older Americans Act is a federal law that aims to improve the well-being and independence of older adults. It provides funding for services like meals, transportation, and caregiver support to help seniors stay healthy, active, and living in their communities.
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	Person who is 60 years or older, used interchangeably with “older adult”
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SFHSA	San Francisco Human Services Agency
Socially Isolated	Having few social relationships and few people to interact with regularly.
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 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 (Chapter 104, Sections 104.1 through 104.9.)
Supervisory District (District)	There are eleven supervisory districts in the City and County of San Francisco. A map of each district can be found at https://www.sf.gov/maps
Volunteer	A volunteer is an individual who offers their time and services willingly and without compensation to assist the grantee in various activities to support their nutrition program(s).
Unduplicated Consumer (UDC)	An eligible individual who participates in a congregate, to-go, or home-delivered meal program, or in the culturally responsive supplemental grocery program, with their participation documented by the grantee in SF DAS GetCare.
Unit of Service (UOS) Congregate Meal	A meal provided to an eligible individual in a congregate group setting, that meets all the requirements of DAS OCP, OAA and OCNP.
Unit of Service (UOS) Home-Delivered Meal	A meal provided to an eligible individual in their place of residence, that meets all the requirements of DAS OCP, OAA and OCNP.
Unit of Service (UOS) To-go Meal	A meal that is picked up at a community site by an eligible individual that meets all the requirements of DAS OCP, OAA and OCNP.
Unit of Service (UOS) Supplemental Bag of Groceries	A culturally responsive supplemental bag of groceries provided to an eligible consumer that meets requirements defined in the grantee's scope of service.

G. Target Population

The programs are designed to serve individuals of all ethnicities and backgrounds, with a focus on addressing the unique cultural needs of those facing the greatest economic and social challenges. This includes:

- Individuals with low income
- Individuals who are socially isolated
- Individuals with limited English proficiency
- Individuals from communities of color
- Individuals who identify as LGBTQ+
- Individuals at risk of institutionalization

II. SCOPE OF WORK

The Scope of Work is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project. Proposers should use this description when designing their proposed programs. However, proposers may suggest modifications and/or additions that will, in their estimation, make the program more feasible or effective. The description below outlines the key program elements and services the selected vendor(s) will provide.

A. Description of Services

Congregate Nutrition Services

Eligibility:

- 1. Congregate nutrition services for older adults (*OAA and Older Californians Nutrition Program C1*)**
 - a. An individual 60 years of age or older
 - b. A spouse or domestic partner who accompanies the eligible participant, regardless of age
 - c. An individual with a disability who resides with and accompanies the eligible participant
 - d. An individual who lives in a senior housing facility that provides congregate nutrition services
- 2. Congregate nutrition services for adults with disabilities:**
 - a. An individual 18 to 59 years of age with a disability
 - b. A spouse or domestic partner who accompanies the eligible participant

Description of services and other requirements:

1. Grantee will provide meals to eligible individuals in a congregate group setting at designated meal site(s), which must be submitted to and pre-approved by DAS OCP. The grantee will ensure that all meal sites comply with applicable federal, state, and local regulations, including those related to restrooms, lighting, and ventilation. Meal sites must be equipped with sturdy tables and chairs suitable for the target population, with tables arranged to promote accessibility and encourage socialization. All meal sites should be open to the public. Meal sites closed to the public must receive prior approval from DAS OCP. Meals served at closed sites cannot be reported under the OAA and CDA nutrition service programs. Meals provided at DAS OCP approved closed sites will be reported under locally funded nutrition service programming.
2. Grantee will provide congregate meals that comply with CDA's OCNP Menu Guidance. Each meal will provide a minimum of one-third of the Dietary Reference Intakes (DRI) and adhere to the Dietary Guidelines for Americans. Meals will be culturally appropriate for the target population(s) served and ready to consume. The grantee will implement an offer versus serve (OVS) congregate meal service, allowing consumers to select the items they wish to eat, helping to reduce food waste.
3. Grantee will provide at least one (1) meal, five (5) days per week, at each DAS-approved congregate meal site and ensure that sites remain open for nutrition services for a minimum of one (1) hour, unless a lesser frequency or duration is approved by DAS OCP. Respondents requesting DAS OCP funding for a site manager and/or coordinator must demonstrate a need for serving an average of 25 or more meals per day.
4. Grantee will implement a forecasting system to closely estimate demand and adjust meal production, accordingly, minimizing meal waste through regular review and adaptation based on actual consumption patterns. The grantee may introduce a consumer reservation system to help manage meal distribution and ensure sufficient availability. The reservation system must include a written policy and process to accommodate a specified number of walk-in consumers, and both the policy and process are subject to DAS OCP approval.
5. Grantee will serve meals in environmentally friendly containers that are reusable, biodegradable, compostable, and/or recyclable. The grantee will comply with the City's Food Service Waste Reduction Ordinance (2007) and the Single-Use Food Ware Plastics Toxics and Litter Reduction Ordinance (2019).
6. Grantee will ensure that each congregate meal site has sufficient staff (paid or volunteers) with the appropriate education, experience, and cultural competency designated to oversee

the day-to-day operations, with at least one staff member physically present on-site during meal service hours.

7. Grantee will manage all aspects of food service, including the procurement, preparation, transport, delivery, and serving of food and meals. The grantee will ensure compliance with the standards established by the California Retail Food Code (CRFC), California Code of Regulations (CCR) Title 22, and the San Francisco Department of Public Health (SFPDH) Environmental Health Branch. This includes but is not limited to the following:
 - a. A Food Facility Permit, also known as a Health Permit, is required for each facility involved in the preparation, handling, and/or serving of food to the public. In addition, the facility must provide a current health inspection report with a “pass” facility rating status, as issued by the Environmental Health Branch of SFPDH.
 - b. A certified Food Safety Manager must be on staff to oversee and manage the day-to-day operations of food service.
 - c. All staff involved in the preparation, storage, service or handling of food and/or meals must engage in approved food safety training.
8. Grantee will ensure all program staff is oriented and trained to perform their assigned responsibilities and tasks. Training at minimum will include:
 - a. Food safety, prevention of foodborne illness, and HACCP principals.
 - b. Accident prevention, instructions on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
9. Grantee will provide a minimum of four (4) hours of annual training for paid and volunteer food service staff, including congregate and home-delivered meal staff. The grantee must develop, implement, and maintain a yearly training plan on file. The plan should include the individuals to be trained, the trainer(s), the training content, and the schedule. The content of the training must be reviewed and approved a Registered Dietitian Nutritionist (RD/RDN). Training sessions will be evaluated by staff, and documentation, including evaluations and attendance records, must be kept on file by the grantee.
10. Grantee will provide the following NCQA activities:
 - a. Menu planning and analysis two (2) times per year.
 - b. HACCP central kitchen and food service monitoring at least once per quarter and a minimum of four (4) times during the fiscal year.
 - c. Congregate site monitoring at least once per quarter and a minimum of four (4) times during the fiscal year per at each meal DAS OCP approved congregate meal site.
 - d. Nutrition education session at least once per quarter and a minimum of four (4) times during the fiscal year per at each DAS OCP approved congregate meal site. Sessions may be conducted in-person or virtually using a video conferencing tool.
11. Grantee will establish and maintain a consumer enrollment process that includes eligibility verification, the collection of required consumer data, completion of a nutrition risk screening using the DETERMINE checklist, and a two-question food security screening. The grantee will document consumer enrollment in the appropriate congregate nutrition program in SF DAS GetCare within one month of obtaining the data, ensuring all collected information is accurately recorded. Additionally, the grantee will establish a disenrollment process for consumers who stop participating in the congregate meal program.
12. Grantee will conduct annual nutrition risk and food security screenings for consumers who remain actively enrolled in the congregate nutrition program. In addition to conducting the screenings, the grantee will reverify consumer data annually to ensure it is current and accurate. Screening results, along with verified and updated consumer data, must be documented in SF DAS GetCare within one month of receiving the information.
13. Grantee will offer consumers who receive a meal with the opportunity to contribute to the cost of the meal, in accordance with DAS OCP Policy Memorandum No. 5. The grantee will

develop a suggested contribution amount, considering the average income range of the consumers accessing the congregate meal program as well as the grantee's other sources of income. A sign will be posted near the contribution collection receptacle, indicating the suggested contribution for eligible individuals and the fee for guests. The sign must clearly state that contributions are voluntary, there is no obligation to contribute, and meals will be provided regardless of whether a contribution is made. The contribution process must ensure confidentiality, with a secure container for collecting contributions. The grantee must also have written procedures in place to protect contributions and fees from loss, mishandling, and theft.

14. Grantee will have procedures in place to obtain views of program participants about the services received. At minimum, the grantee will develop and administer an annual consumer satisfaction survey to capture feedback on program outcomes and service quality. The survey will be reviewed and approved by DAS OCP. The results will be shared with DAS OCP by March 15 each grant year, or on a mutually agreed-upon date.
15. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training annually, in accordance with the DAS OCP Policy Memorandum No. 45. Within 30 days of their start date, any new employee, subcontractor, or volunteer must also complete this training. The grantee will maintain records of completion. The grantee shall comply with the applicable privacy and security rules of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
16. Grantee will ensure that all program staff, regardless of position, receive initial training on elder abuse and mandated reporting. Program staff who interact with consumers must complete this training annually, in accordance with the DAS OCP Policy Memorandum No. 35.
17. Grantee shall develop a written grievance process for reviewing and resolving service concerns raised by consumers or their authorized representatives regarding DAS-funded programs and their employees or volunteers, in accordance with DAS OCP Policy Memorandum No. 33. This process must ensure that consumers have clearly established rights and due process for timely resolution of their concerns.
18. Grantee will ensure that DAS funding information is prominently displayed on its websites and publications related to the DAS-funded nutrition program, in accordance with DAS OCP Policy Memorandum No.47.
19. 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.
20. Grantee will arrange for the availability of food to participants during a major disaster where feasible and appropriate.
21. Grantee will conduct outreach activities to connect with the target population(s) and promote program services.

Congregate To-Go Meal Nutrition Services

A congregate nutrition services grantee may offer to-go meals at one or more DAS OCP pre-approved meal sites to complement their congregate meal program. To-go meal service is intended to complement, not take the place of in-person dining at a congregate meal site.

Eligibility:

1. **Congregate to-go meal nutrition services for older adults (*OAA and Older Californians Nutrition Program-C2*):**
 - a. An individual 60 years of age or older living in the City and County of San Francisco who is homebound due to illness or disability, or otherwise isolated.

- b. A spouse or domestic partner who accompanies the eligible participant, regardless of age or condition, if an assessment by the grantee concludes that it is in the best interest of the eligible participant.
 - c. An individual who lives in a senior housing facility that provides congregate nutrition services.
- 2. Congregate to-go meal nutrition services for adults with disabilities:**
- a. An individual 18 to 59 years of age with a disability
 - b. A spouse or domestic partner who accompanies the eligible participant, regardless of age or condition, if an assessment by the grantee concludes that it is in the best interest of the eligible participant.

Description of services and other requirements:

1. Grantee will provide to-go meal nutrition services to complement, and not replace, the dine-in congregate nutrition services offered at DAS OCP pre-approved meal sites. The grantee may offer to-go meal services on one or more of the days the pre-approved site is open for dine-in services.
2. Grantee will provide congregate to-go meals that comply with CDA's OCNP Menu Guidance. Each meal will provide a minimum of one-third of the Dietary Reference Intakes (DRI) and adhere to the Dietary Guidelines for Americans. Meals will be culturally appropriate for the target population(s) served and may be hot, cold, and/or frozen depending on what is most suitable for the population served at the meal site(s).
3. Grantee will provide to-go meals in environmentally friendly containers that are reusable, biodegradable, compostable, and/or recyclable. The grantee will ensure that the to-go containers are sturdy, easy to carry and transport, and adequately cover the prepared food. The grantee will comply with the City's Food Service Waste Reduction Ordinance (2007) and the Single-Use Food Ware Plastics Toxics and Litter Reduction Ordinance (2019).
4. Grantee will implement a forecasting system to closely estimate demand to-go meals and adjust meal preparation, accordingly, minimizing waste through regular review and adaptation based on actual consumption patterns. The grantee may introduce a consumer reservation system to help manage meal distribution and ensure sufficient availability. The reservation system must include a written policy and process to accommodate a specified number of walk-in consumers, and both the policy and process are subject to DAS OCP approval.
5. Grantee will ensure that each congregate to-go meal site has sufficient staff (paid or volunteers) with the appropriate education, experience, and cultural competency designated to oversee the day-to-day operations, with at least one staff member physically present on-site during meal service hours.
6. Grantee will manage all aspects of food service, including the procurement, preparation, transport, delivery, and distribution of food and meals to consumers. The grantee will ensure compliance with the standards established by the California Retail Food Code (CRFC), California Code of Regulations (CCR) Title 22, and the San Francisco Department of Public Health (SFDPH) Environmental Health Branch. This includes but is not limited to the following:
 - a. A Food Facility Permit, also known as a Health Permit, is required for each facility involved in the preparation, handling, and/or serving of food to the public. In addition, the facility must provide a current health inspection report with a "pass" facility rating status, as issued by the Environmental Health Branch of SFDPH.
 - b. A certified Food Safety Manager must be on staff to oversee and manage the day-to-day operations of food service.
 - c. All staff involved in the preparation, storage, service or handling of food and/or meals must engage in approved food safety training.

7. Grantee will ensure all program staff is oriented and trained to perform their assigned responsibilities and tasks. Training at minimum will include:
 - a. Food safety, prevention of foodborne illness, and HACCP principals.
 - b. Accident prevention, instructions on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
8. Grantee will provide a minimum of four (4) hours of annual training for paid and volunteer food service staff, including congregate and home-delivered meal staff. The grantee must develop, implement, and maintain a yearly training plan on file. The plan should include the individuals to be trained, the trainer(s), the training content, and the schedule. The content of the training must be reviewed and approved a Registered Dietitian Nutritionist (RD/RDN). Training sessions will be evaluated by staff, and documentation, including evaluations and attendance records, must be kept on file by the grantee.
9. Grantee will carry out the following NCQA activities if the to-go meal nutrition services menu and food service operation differ from those of the dine-in congregate nutrition services provided by the grantee:
 - a. Menu planning and analysis two (2) times per year
 - b. HACCP central kitchen and food service monitoring at least once per quarter and a minimum of four (4) times during the fiscal year.
 - c. Congregate site monitoring at least once per quarter and a minimum of four (4) times during the fiscal year per at each meal DAS OCP approved congregate meal site.
10. Grantee will provide a nutrition education session at least once per quarter, totaling a minimum of four (4) sessions per fiscal year, at each DAS OCP-approved congregate meal site offering to-go meal services for consumers who receive meals to go.
11. Grantee will establish and maintain a consumer enrollment process that includes conducting a nutrition service assessment for to-go meals within two weeks of the consumer receiving their first meal and annually thereafter. The assessment may be done with the consumer at the time of meal pick up or via telephone. The grantee will document the assessment and consumer information in SF DAS GetCare within one month of collecting the data, ensuring that all information is accurately recorded. The assessment will:
 - a. Verify the consumer's need for to-go meal nutrition services and appropriateness of the type of meal being provided.
 - b. Screen functional ability through a series of required questions related to activities of daily living (ADL) and instrumental activities of daily living (IADL).
 - c. Obtain consumer demographic and other information as required by federal, state, and local government.
 - d. Include completion of a nutrition risk screening using the DETERMINE checklist and a two-question food security screening.
12. Grantee will provide consumers with the following information at minimum during the enrollment process:
 - a. Safe food handling instructions for the meal(s) including reheating instructions if applicable.
 - b. Voluntary contribution policy.
 - c. Grievance policy.
 - d. Information on how to contact and request assistance from the grantee when needed.
13. Grantee will conduct and document nutrition service reassessments for program participants on a quarterly basis to confirm continued eligibility for to-go meal nutrition services. Reassessments may be done with the consumer at the time of meal pick up or via telephone. The grantee will also establish a disenrollment process for consumers who are no longer eligible or who choose to discontinue services.

14. Grantee will offer consumers who receive a meal with the opportunity to contribute to the cost of the meal, in accordance with DAS OCP Policy Memorandum No. 5. The grantee will develop a suggested contribution amount, considering the average income range of the consumers accessing the to-go meal nutrition program as well as the grantee's other sources of income. During the enrollment process, the grantee will provide consumers with written information explaining voluntary contributions and how to make them if they choose to do so. Additionally, a sign will be posted near the contribution collection receptacle at the congregate meal site, indicating the suggested contribution for eligible individuals and the fee for guests. The sign and written information provided to the consumer must clearly state that contributions are voluntary, there is no obligation to contribute, and meals will be provided regardless of whether a contribution is made. The contribution process must ensure confidentiality, with a secure container for collecting contributions. The grantee must also have written procedures in place to protect contributions and fees from loss, mishandling, and theft.
15. Grantee will have procedures in place to obtain views of program participants about the services received. At minimum, the grantee will develop and administer an annual consumer satisfaction survey to capture feedback on program outcomes and service quality. The survey will be reviewed and approved by DAS OCP. The results will be shared with DAS OCP by March 15 each grant year, or on a mutually agreed-upon date.
16. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training annually, in accordance with the DAS OCP Policy Memorandum No. 45. Within 30 days of their start date, any new employee, subcontractor, or volunteer must also complete this training. The grantee will maintain records of completion. The grantee shall comply with the applicable privacy and security rules of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
17. Grantee will ensure that all program staff, regardless of position, receive initial training on elder abuse and mandated reporting. Program staff who interact with consumers must complete this training annually, in accordance with the DAS OCP Policy Memorandum No. 35.
18. Grantee shall develop a written grievance process for reviewing and resolving service concerns raised by consumers or their authorized representatives regarding DAS-funded programs and their employees or volunteers, in accordance with DAS OCP Policy Memorandum No. 33. This process must ensure that consumers have clearly established rights and due process for timely resolution of their concerns.
19. Grantee will ensure that DAS funding information is prominently displayed on its websites and publications related to the DAS-funded nutrition program, in accordance with DAS OCP Policy Memorandum No.47.
20. 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.
21. Grantee will arrange for the availability of food to participants during a major disaster where feasible and appropriate.
22. Grantee will conduct outreach activities to connect with the target population(s) and promote program services.

Congregate Nutrition Services-CHAMPSS

Eligibility:

- 1. Congregate nutrition services for older adults (*OAA and Older Californians Nutrition Program-C1*)**
 - a. An individual 60 years of age or older

- b. A spouse or domestic partner who accompanies the eligible participant, regardless of age
- c. An individual with disability who reside with and accompanies the eligible participant

Description of services and other requirements:

1. Grantee will provide meals to eligible individuals in a congregate setting at DAS OCP-approved restaurant locations. The grantee will ensure that restaurant meal sites comply with applicable federal, state, and local regulations, including those related to restrooms, lighting, and ventilation. Restaurant meal sites must be equipped with sturdy tables and chairs suitable for the target population, with tables arranged to promote accessibility and encourage socialization.
2. Grantee will recruit restaurants within the designated supervisorial districts identified in this RFP (Districts 1, 4, 7, and 11) to serve as congregate meal sites for the CHAMPSS program. Formal written agreements must be established with each restaurant partner. The CHAMPSS program must operate at each restaurant at least five (5) days per week, for a minimum of four (4) hours per day. The program's days and hours of operation are subject to DAS OCP approval. The grantee will work with restaurant partners to ensure they provide culturally appropriate meals tailored to the target population(s) in these districts. DAS OCP will collaborate with the grantee on an ongoing basis to reassess the specific needs of each district, including preferences for types of cuisine.
3. Grantee will establish partnerships with restaurants that have a valid Food Facility Permit, also known as a Health Permit and a current health inspection report with a "pass" facility rating status, as issued by the Environmental Health Branch of SFDPH. The grantee will ensure that restaurant partners are able to comply with applicable standards established by the California Retail Food Code (CRFC), California Code of Regulations (CCR) Title 22, and the San Francisco Department of Public Health (SFDPH) Environmental Health Branch for all aspects of food service and that each have a certified food safety manager on staff to oversee and manage the day-to-day operations of food service.
4. Grantee will coordinate all aspects of onboarding restaurants as congregate meal partners. This includes, but is not limited to, developing policies and procedures with the restaurant to ensure compliance with the requirements of congregate nutrition services.
5. Grantee will ensure that all meals served at partner restaurants comply with the California Department of Aging's (CDA) OCNP Menu Guidance, providing a minimum of one-third of the Dietary Reference Intakes (DRI) and adhering to the Dietary Guidelines for Americans. Meals should be culturally appropriate, tailored to the target population(s) in those districts. Restaurant partners will implement an offer versus serve (OVS) congregate meal service, allowing consumers to choose the items they wish to eat from the approved CHAMPSS menu to help reduce food waste.
6. Grantee will ensure restaurant partners serve meals in environmentally friendly containers that are reusable, biodegradable, compostable, and/or recyclable and that the restaurants comply with the City's Food Service Waste Reduction Ordinance (2007) and the Single-Use Food Ware Plastics Toxics and Litter Reduction Ordinance (2019).
7. Grantee will ensure all program staff is oriented and trained to perform their assigned responsibilities and tasks. Training at minimum will include:
 - a. Food safety, prevention of foodborne illness, and HACCP principals.
 - b. Accident prevention, instructions on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
8. Grantee will provide a minimum of four (4) hours of annual training for paid and volunteer food service staff, including congregate and home-delivered meal staff. The grantee must develop, implement, and maintain a yearly training plan on file. The plan should include the individuals to be trained, the trainer(s), the training content, and the schedule. The content of

the training must be reviewed and approved a Registered Dietitian Nutritionist (RD/RDN). Training sessions will be evaluated by staff, and documentation, including evaluations and attendance records, must be kept on file by the grantee.

9. Grantee will provide the following NCQA activities:
 - a. Menu planning and analysis at least once per year.
 - b. HACCP restaurant kitchen and congregate food service monitoring at least once per quarter and a minimum of four (4) times during the fiscal year.
 - c. Nutrition education session at least once per quarter and a minimum of four (4) times during the fiscal year for each CHAMPSS restaurant site. Sessions may be conducted in-person, virtually, or via online pre-recorded video.
10. Grantee will establish and maintain a consumer enrollment process that includes eligibility verification, the collection of required consumer data, completion of a nutrition risk screening using the DETERMINE checklist, and a two-question food security screening. The grantee will document consumer enrollment in the appropriate congregate nutrition program in SF DAS GetCare within one month of obtaining the data, ensuring all collected information is accurately recorded. Additionally, the grantee will establish a disenrollment process for consumers who stop participating in the congregate meal program.
11. Grantee will conduct annual nutrition risk and food security screenings for consumers who remain actively enrolled in the CHAMPSS congregate nutrition program. In addition to conducting the screenings, the grantee will reverify consumer data annually to ensure it is current and accurate. Screening results, along with verified and updated consumer data, must be documented in SF DAS GetCare within one month of receiving the information.
12. Grantee will provide consumers who receive a meal with the opportunity to contribute to the cost of the meal, in accordance with DAS OCP Policy Memorandum No. 5. The grantee will develop a suggested contribution amount, considering the average income range of the consumers accessing the congregate meal program as well as the grantee's other sources of income. A notice will be posted at the contribution collection location, whether in-person or online, indicating the suggested contribution for eligible individuals and the fee for guests. The notice must clearly state that contributions are voluntary, there is no obligation to contribute, and meals will be provided regardless of whether a contribution is made. The contribution process must ensure confidentiality. The grantee must also have written procedures in place to protect contributions and fees from loss, mishandling, and theft.
13. Grantee will have procedures in place for obtain views of program participants about the services received. At minimum, the grantee will develop and administer an annual consumer satisfaction survey to capture feedback on program outcomes and service quality. The survey will be reviewed and approved by DAS OCP. The results will be shared with DAS OCP by March 15 each grant year, or on a mutually agreed-upon date.
14. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training annually, in accordance with the DAS OCP Policy Memorandum No. 45. Within 30 days of their start date, any new employee, subcontractor, or volunteer must also complete this training. The grantee will maintain records of staff completion. The grantee shall comply with the applicable privacy and security rules of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
15. Grantee will ensure that all program staff, regardless of position, and restaurant partners receive initial training on elder abuse and mandated reporting. Staff who interact with consumers must complete this training annually, in accordance with the DAS OCP Policy Memorandum No. 35.
16. Grantee shall develop a written grievance process for reviewing and resolving service concerns raised by consumers or their authorized representatives regarding DAS-funded programs and their employees or volunteers, in accordance with DAS OCP Policy

Memorandum No. 33. This process must ensure that consumers have clearly established rights and due process for timely resolution of their concerns.

17. Grantee will ensure that DAS funding information is prominently displayed on its websites and publications related to the DAS-funded nutrition programs, in accordance with DAS OCP Policy Memorandum No.47.
18. 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.
19. Grantee will arrange for the availability of food to participants during a major disaster where feasible and appropriate.
20. Grantee will conduct outreach activities to connect with the target population(s) and promote program services.

Home-Delivered Nutrition Services

Eligibility:

1. **Home-delivered nutrition services for older adults (*OAA and Older Californians Nutrition Program-C2*):**
 - a. An individual 60 years of age or older living in the City and County of San Francisco who is frail, homebound due to illness or disability, or otherwise isolated.
 - b. A spouse or domestic partner of an eligible participant, regardless of age or condition, if an assessment by the grantee concludes that it is in the best interest of the eligible participant.
 - c. An individual with a disability who resides at home with an eligible participant, regardless of age or condition, if an assessment by the grantee concludes that it is in the best interest of the eligible participant.
2. **Home-delivered nutrition services for adults with disabilities:**
 - a. An individual 18 to 59 years of age with a disability living in the City and County of San Francisco who is frail, homebound, or otherwise isolated.
 - b. A spouse or domestic partner of an eligible participant, regardless of age or condition, if an assessment by the grantee concludes that it is in the best interest of the eligible participant.

Description of services and other requirements:

1. Grantee will provide and deliver meals to eligible individuals at their homes. All meals must comply with the California Department of Aging's (CDA) Older Californians Nutrition Program (OCNP) Menu Guidance, meeting a minimum of one-third of the Dietary Reference Intakes (DRI) and adhering to the Dietary Guidelines for Americans. Meals should be culturally appropriate for the target population(s).
2. Grantee must be able to provide consumers with at least five (5) meals per week. With DAS OCP approval, the grantee may offer more than five (5) meals per week per consumer when there is a demonstrated need, and the grantee's program model supports the increased provision. Meals may be hot, chilled, or frozen, depending on consumer needs. When determining meal types, the consumer's ability to safely reheat and store food, as well as their overall nutrition support needs, should be considered. Texture-modified meals, such as dental-soft options, may also be offered for consumers with chewing difficulties.
3. Grantee will provide meals in environmentally friendly containers that are reusable, biodegradable, compostable, and/or recyclable. The grantee will comply with the City's Food Service Waste Reduction Ordinance (2007) and the Single-Use Food Ware Plastics Toxics and Litter Reduction Ordinance (2019).

4. Grantee will employ a qualified manager to oversee the daily management and administrative functions of the home-delivered nutrition services program. The grantee will ensure there is sufficient staff (paid or volunteer) with the necessary education, experience, and cultural competency designated to support the daily operations of the program.
5. Grantee will manage all aspects of food service, including the procurement, preparation, transport, and delivery of food and meals to program participants. The grantee will ensure compliance with the standards established by the California Retail Food Code (CRFC), California Code of Regulations (CCR) Title 22, and the San Francisco Department of Public Health (SFPDH) Environmental Health Branch. This includes but is not limited to the following:
 - a. A Food Facility Permit, also known as a Health Permit, is required for each facility involved in the preparation, handling, and/or serving of food to the public. In addition, the facility must provide a current health inspection report with a “pass” facility rating status, as issued by the Environmental Health Branch of SFPDH.
 - b. A certified Food Safety Manager must be on staff to oversee and manage the day-to-day operations of food service.
 - c. All staff involved in the preparation, storage, service or handling of food and/or meals must engage in approved food safety training.
6. Grantee will ensure all program staff is oriented and trained to perform their assigned responsibilities and tasks. Training at minimum will include:
 - c. Food safety, prevention of foodborne illness, and HACCP principals.
 - d. Accident prevention, instructions on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
7. Grantee will provide a minimum of four (4) hours of annual training for paid and volunteer food service staff, including congregate and home-delivered meal staff. The grantee must develop, implement, and maintain a yearly training plan on file. The plan should include the individuals to be trained, the trainer(s), the training content, and the schedule. The content of the training must be reviewed and approved a Registered Dietitian Nutritionist (RD/RDN). Training sessions will be evaluated by staff, and documentation, including evaluations and attendance records, must be kept on file by the grantee
8. Grantee will provide the following NCQA activities:
 - a. Menu planning and analysis two (2) times per year.
 - b. HACCP central kitchen and food service monitoring at least once per quarter and a minimum of four (4) times during the fiscal year.
 - c. HDM route monitoring once per quarter, with each specific route monitored at least twice during the fiscal year.
 - d. Nutrition education session at least once per quarter and a minimum of four (4) times during the fiscal year.
9. Grantee will utilize the DAS OCP centralized waiting list on SF DAS GetCare to identify and enroll eligible consumers. Initial eligibility will be determined by the DAS Benefits and Resources Hub through a telephone screening process. The grantee will prioritize selection and enrollment of consumers from the waiting list based on the following criteria:
 - a. Cuisine preference: Matching the consumer’s preferred cuisine with the options the grantee is funded to provide.
 - b. Grantee delivery capacity: Availability of delivery in the designated service area, which may include a supervisorial district, specific zip code, or established delivery route.
 - c. Once the cuisine and delivery capacity are met, the grantee will select the consumer with the highest numeric priority score for enrollment from the waiting list.
10. Grantee will establish and maintain a consumer enrollment process that includes conducting a nutrition service assessment within two weeks of the consumer receiving their first home-

delivered meal and annually thereafter. The grantee will document the assessment and consumer information in SF DAS GetCare within one month of collecting the data, ensuring that all information is accurately recorded. The assessment will:

- a. Verify the consumer's need for home-delivered nutrition services.
 - b. Screen functional ability through a series of required questions related to activities of daily living (ADL) and instrumental activities of daily living (IADL).
 - c. Confirm the appropriateness of the type of meal being provided.
 - d. Evaluate the consumer's need for additional nutrition-related or other supportive services.
 - e. Obtain consumer demographic and other information as required by federal, state, and local government.
 - f. Include completion of a nutrition risk screening using the DETERMINE checklist and a two-question food security screening.
11. Grantee will provide consumers with the following information at minimum during the enrollment process:
- a. Delivery schedule for meals.
 - b. Copy of the current monthly menu.
 - c. Safe food handling instructions for the meal(s) including reheating instructions if applicable.
 - d. Voluntary contribution policy.
 - e. Grievance policy.
 - f. Information on how to request assistance from the grantee when needed.
12. Grantee will conduct and document nutrition service reassessments for program participants on a quarterly basis to confirm continued eligibility for services. Reassessments may be conducted in person or over the phone however consumers must be assessed in person every other quarter. Reassessments may be conducted by delivery staff or volunteers who have been trained by qualified staff. The grantee will also establish a disenrollment process for consumers who are no longer eligible or who choose to discontinue services.
13. Grantee will offer consumers who receive a meal the opportunity to contribute to the cost of the meal, in accordance with DAS OCP Policy Memorandum No. 5. The Grantee will develop a suggested contribution amount based on the average income range of consumers accessing the home-delivered meal program, as well as the grantee's other funding sources. During the enrollment process, the grantee will provide consumers with written information explaining voluntary contributions and how to make them if they choose to do so. This notification must clearly state that contributions are voluntary, there is no obligation to contribute, and services will be provided regardless of whether a contribution is made. The contribution process must ensure confidentiality, and the grantee must have written procedures in place to safeguard contributions and fees from loss, mishandling, or theft.
14. Grantee will have procedures in place to obtain views of program participants about the services received. At minimum, the grantee will develop and administer an annual consumer satisfaction survey to capture feedback on program outcomes and service quality. The survey will be reviewed and approved by DAS OCP. The results will be shared with DAS OCP by March 15 each grant year, or on a mutually agreed-upon date.
15. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training annually, in accordance with the DAS OCP Policy Memorandum No. 45. Within 30 days of their start date, any new employee, subcontractor, or volunteer must also complete this training. The grantee will maintain records of completion. The grantee shall comply with the applicable privacy and security rules of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
16. Grantee will ensure that all program staff, regardless of position, receive initial training on elder abuse and mandated reporting. Program staff who interact with consumers must

complete this training annually, in accordance with the DAS OCP Policy Memorandum No. 35.

17. Grantee shall develop a written grievance process for reviewing and resolving service concerns raised by consumers or their authorized representatives regarding DAS-funded programs and their employees or volunteers, in accordance with DAS OCP Policy Memorandum No. 33. This process must ensure that consumers have clearly established rights and due process for timely resolution of their concerns.
18. Grantee will ensure that DAS funding information is prominently displayed on its websites and publications related to the DAS-funded nutrition program, in accordance with DAS OCP Policy Memorandum No.47.
19. 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.
20. Grantee will arrange for the availability of food to participants during a major disaster where feasible and appropriate.
21. Grantee will conduct outreach activities to connect with the target population(s) and promote program services.

**Citywide Emergency Home-Delivered Meal Services
for Older Adults and Adults with Disabilities**

Only agencies awarded a grant to provide home-delivered nutrition services for older adults and/or adults with disabilities, and capable of delivering services citywide throughout San Francisco, are eligible to receive a grant for emergency HDM services. Grants will not be awarded solely for emergency HDM services.

Eligibility:

- a. An older adult or an adult with a disability living in the City and County of San Francisco who has been screened and approved for emergency home delivered meal services by DAS OCP through the DAS Benefits and Resource Hub.

Description of services and other requirements:

1. Grantee will provide and deliver meals to eligible individuals at their homes, citywide throughout San Francisco, who have an urgent or temporary need for meal support that cannot be met through other available resources. Eligibility for emergency meal services will be determined by the DAS Benefits and Resource Hub. The grantee will deliver meals within two (2) to five (5) days of the consumer's eligibility date. A consumer shall not receive emergency meals for more than sixty (60) days. If meals are needed beyond 60 days, the grantee will transfer the consumer to an appropriate non-emergency home-delivered meal program, which may be either the grantee's own program or another DAS OCP HDM meal partner funded to provide ongoing meal services, as soon as possible.
2. Grantee will provide meals that comply with the California Department of Aging's (CDA) Older Californians Nutrition Program (OCNP) Menu Guidance, meeting a minimum of one-third of the Dietary Reference Intakes (DRI) and adhering to the Dietary Guidelines for Americans.
3. Grantee must be able to provide consumers with at least five (5) meals per week. With DAS OCP approval, the grantee may offer more than five (5) meals per week per consumer when there is a demonstrated need, and the grantee's program model supports the increased provision. Meals may be hot, chilled, or frozen, depending on consumer needs. When determining meal types, the consumer's ability to safely reheat and store food, as well as their overall nutrition support needs, should be considered. Texture-modified meals, such as dental-soft options, may also be offered for consumers with chewing difficulties.

4. Grantee will provide meals in environmentally friendly containers that are reusable, biodegradable, compostable, and/or recyclable. The grantee will comply with the City's Food Service Waste Reduction Ordinance (2007) and the Single-Use Food Ware Plastics Toxics and Litter Reduction Ordinance (2019).
5. Grantee will employ a qualified manager to oversee the daily management and administrative functions of the home-delivered nutrition services programs. The grantee will ensure there is sufficient staff (paid or volunteer) with the necessary education, experience, and cultural competency designated to support the daily operations of the programs.
6. Grantee will manage all aspects of food service, including the procurement, preparation, transport, delivering, and serving of food and meals, in compliance with the standards established by the California Retail Food Code (CRFC), California Code of Regulations (CCR) Title 22, and the San Francisco Department of Public Health (SFPDH) Environmental Health Branch. This includes but is not limited to the following:
 - a. A Food Facility Permit, also known as a Health Permit, is required for each facility involved in the preparation, handling, and/or serving of food to the public. In addition, the facility must provide a current health inspection report with a "pass" facility rating status, as issued by the Environmental Health Branch of SFPDH.
 - b. A certified Food Safety Manager must be on staff to oversee and manage the day-to-day operations of food service.
 - c. All staff involved in the preparation, storage, service or handling of food and/or meals must engage in approved food safety training.
7. Grantee will ensure all program staff is oriented and trained to perform their assigned responsibilities and tasks. Training at minimum will include:
 - e. Food safety, prevention of foodborne illness, and HACCP principals.
 - f. Accident prevention, instructions on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
8. Grantee will provide a minimum of four (4) hours of annual training for paid and volunteer food service staff, including congregate and home-delivered meal staff. The grantee must develop, implement, and maintain a yearly training plan on file. The plan should include the individuals to be trained, the trainer(s), the training content, and the schedule. The content of the training must be reviewed and approved a Registered Dietitian Nutritionist (RD/RDN). Training sessions will be evaluated by staff, and documentation, including evaluations and attendance records, must be kept on file by the grantee.
9. Grantee will provide the following NCQA activities:
 - a. Menu planning and analysis at least once per year.
 - b. HACCP central kitchen and food service monitoring at least once per quarter and a minimum of four (4) times during the fiscal year.
 - c. HDM route monitoring once per quarter, with each specific route monitored at least twice during the fiscal year.
10. Grantee will use the DAS OCP centralized waiting list on SF DAS GetCare to identify and enroll consumers in emergency home-delivered nutrition services. The grantee will prioritize consumer enrollment based on the number of days the consumer has been waiting for services. Consumers who have been on the waiting list longest will be enrolled first.
11. Grantee will establish and maintain a consumer enrollment process that includes providing consumers with the following information at minimum during the enrollment process:
 - a. Delivery schedule for meals
 - b. Copy of the current monthly menu
 - c. Safe food handling instructions for the meal(s) including reheating instructions if applicable
 - d. Voluntary contribution policy

- e. Grievance policy
 - f. Information on how to request assistance from the grantee when needed
12. Grantee will offer consumers who receive a meal the opportunity to contribute to the cost of the meal, in accordance with DAS OCP Policy Memorandum No. 5. The Grantee will develop a suggested contribution amount based on the average income range of consumers accessing the home-delivered meal program, as well as the Grantee's other funding sources. During the enrollment process, the grantee will provide consumers with written information explaining voluntary contributions and how to make them if they choose to do so. This notification must clearly state that contributions are voluntary, there is no obligation to contribute, and services will be provided regardless of whether a contribution is made. The contribution process must ensure confidentiality, and the grantee must have written procedures in place to safeguard contributions and fees from loss, mishandling, or theft.
 13. Grantee will have procedures in place to obtain views of program participants about the services received. At minimum, the grantee will develop and administer an annual consumer satisfaction survey to capture feedback on program outcomes and service quality. The survey will be reviewed and approved by DAS OCP. The results will be shared with DAS OCP by March 15 each grant year, or on a mutually agreed-upon date.
 14. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training annually, in accordance with the DAS OCP Policy Memorandum No. 45. Within 30 days of their start date, any new employee, subcontractor, or volunteer must also complete this training. The grantee will maintain records of completion. The grantee shall comply with the applicable privacy and security rules of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
 15. Grantee will ensure that all program staff, regardless of position, receive initial training on elder abuse and mandated reporting. Program staff who interact with consumers must complete this training annually, in accordance with the DAS OCP Policy Memorandum No. 35.
 16. Grantee shall develop a written grievance process for reviewing and resolving service concerns raised by consumers or their authorized representatives regarding DAS-funded programs and their employees or volunteers, in accordance with DAS OCP Policy Memorandum No. 33. This process must ensure that consumers have clearly established rights and due process for timely resolution of their concerns.
 17. Grantee will ensure that DAS funding information is prominently displayed on its websites and publications related to the DAS-funded nutrition program, in accordance with DAS OCP Policy Memorandum No.47.
 18. 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.
 19. Grantee will arrange for the availability of food to participants during a major disaster where feasible and appropriate.
 20. Grantee will conduct outreach activities to connect with the target population(s) and promote program services.

Culturally Responsive Supplemental Grocery Program

A congregate nutrition services grantee may offer a culturally responsive supplemental grocery program to complement their congregate meal program. Only agencies awarded a grant to provide congregate nutrition services for older adults and/or adults with disabilities are eligible to receive a grant for a culturally responsive supplemental grocery program. A grant will not be awarded solely for a culturally responsive supplemental grocery program.

Eligibility:

To participate in the DAS OCP funded culturally responsive supplemental grocery program, individuals must meet all the following criteria:

- a. A resident of San Francisco.
- b. An older adult or an adult with disability.
- c. Income at or below 200% of the federal poverty line.
- d. High nutritional risk using the DETERMINE Checklist or food insecure using the two-question validated screening tool.
- e. Capacity to store and handle food safely.
- f. Able to prepare or utilize food at home or have a caregiver who can assist.
- g. Not currently enrolled in a DAS OCP-funded Home-Delivered Grocery (HDG) program.
- h. Not currently enrolled in a DAS OCP-funded Home-Delivered Meal (HDM) program that provides the equivalent of two (2) home delivered meals on 5 or more days per week.

Description of Services and Program Requirements:

1. Grantee will provide weekly distributions of supplemental groceries to eligible consumers at DAS OCP-approved site locations using a farmers' market-style pantry approach. This model allows consumers to select the food items they prefer and decline those they do not, which helps reduce food waste and supports more strategic procurement of groceries. Alternative program designs, including variations in frequency and/or distribution methods, may be considered if submitted to and approved by DAS OCP.
2. Grantee will procure a sufficient quantity and variety of food to meet the service and outcome objectives for their proposed program model. Grantee will ensure their program design and program operations complies with the standards established by the California Retail Food Code (CRFC) and the San Francisco Department of Public Health (SFPDH) Environmental Health Branch, if applicable. This includes but is not limited to the following:
 - a. A Food Facility Permit, also known as a Health Permit, is required for each facility involved in the preparation, handling, and/or distribution of food to the public. In addition, the facility must provide a current health inspection report with a “pass” facility rating status, as issued by the Environmental Health Branch of SFPDH.
 - b. All staff involved in the preparation, storage, service or handling of food and/or meals must engage in approved food safety training.
3. Grantee will ensure that all food procured aligns with the most current Dietary Guidelines for Americans (DGA). The grantee will develop a standard menu of food items for program participants, providing an overview of the types and quantities of food that will be offered each week. The menu must be approved by DAS OCP in advance and should detail the USDA-defined food groups, along with estimated quantities for each group. Each distribution must include at least two food items from the following three USDA-defined food groups:
 - a. Vegetable (juice may not be counted towards this requirement)
 - b. Fruit (juice may not be counted towards this requirement)
 - c. Grain (grain product must be at least 50% whole grain)
4. Grantee will provide groceries in environmentally friendly packaging that is reusable, biodegradable, compostable, and/or recyclable. The grantee will comply with the City’s Food Service Waste Reduction Ordinance (2007) and the Single-Use Food Ware Plastics Toxics and Litter Reduction Ordinance (2019).
5. Grantee will establish and maintain a consumer enrollment process that includes eligibility verification, the collection of required consumer data, completion of a nutrition risk screening using the DETERMINE checklist, and a two-question food security screening. The

- grantee will document consumer enrollment in SF DAS GetCare within one month of obtaining the data, ensuring all collected information is accurately recorded.
6. Grantee will implement an annual consumer reassessment process to verify continued eligibility for program enrollment and to collect accurate, up-to-date consumer data. This process will include annual nutrition risk and food security screenings. The grantee will update consumer records in SF DAS GetCare within one month of gathering reassessment data, ensuring all changes are accurately recorded. Additionally, the grantee will establish a disenrollment process for consumers who are no longer eligible or who choose to discontinue services.
 7. Grantee will provide orientation and training to all new program staff, both paid and volunteer, to ensure they can perform their assigned responsibilities. All staff must complete food safety training before handling food for distribution to consumers. Additionally, the grantee will conduct in-service training for program staff at least twice per year, with one session focused on food safety to prevent foodborne illness and ensure food is safe for consumption. An annual in-service training schedule must be created and submitted to DAS at the start of each fiscal year. The grantee will maintain attendance records with signatures or proof of completion of these training sessions.
 8. Grantee will ensure there is sufficient program staff with the necessary education, experience, and cultural competency designated to support the operations of the supplemental grocery program.
 9. Grantee will have a written policy and procedures in place for accepting and handling of program income in accordance with the DAS OCP Policy Memorandum No. 5.
 10. Grantee will have procedures in place to obtain views of program participants about the services received. At minimum, the grantee will develop and administer an annual consumer satisfaction survey to capture feedback on program outcomes and service quality. The survey will be reviewed and approved by DAS OCP. The results will be shared with DAS OCP by March 15 each grant year, or on a mutually agreed-upon date.
 11. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training annually, in accordance with the DAS OCP Policy Memorandum No. 45. Within 30 days of their start date, any new employee, subcontractor, or volunteer must also complete this training. The grantee will maintain records of completion. The grantee shall comply with the applicable privacy and security rules of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
 12. Grantee will ensure that all program staff, regardless of position, receive initial training on elder abuse and mandated reporting. Program staff who interact with consumers must complete this training annually, in accordance with the DAS OCP Policy Memorandum No. 35.
 13. Grantee shall develop a written grievance process for reviewing and resolving service concerns raised by consumers or their authorized representatives regarding DAS-funded programs and their employees or volunteers, in accordance with DAS OCP Policy Memorandum No. 33. This process must ensure that consumers have clearly established rights and due process for timely resolution of their concerns.
 14. Grantee will ensure that DAS funding information is prominently displayed on its websites and publications related to the DAS-funded nutrition program, in accordance with DAS OCP Policy Memorandum No.47.
 15. 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.
 16. Grantee will arrange for the availability of food to participants during a major disaster where feasible and appropriate.

17. Grantee will conduct outreach activities to connect with the target population(s) and promote program services.

The minimum units of services to be provided through this funding is estimated to be the following:

Nutrition Services	Unit of Service	Estimated Quantity
Congregate Nutrition Services for Older Adults	Congregate Meal (Dine in)	1,060,222
Congregate Nutrition Services for Older Adults	To-go Meal	
Congregate Nutrition Services for Adults with Disabilities	Congregate Meal (Dine in)	140,803
Congregate Nutrition Services for Adults with Disabilities	To-go Meal	
Home-Delivered Nutrition Services for Older Adults	Home-Delivered Meal	1,766,284
Home-Delivered Services for Adults with Disabilities	Home-Delivered Meal	249,627
Emergency Home-Delivered Meal Program for Older Adults and Adults with Disabilities	Home-Delivered Meal	27,870
Culturally Responsive Supplemental Grocery Program	Supplemental Bag of Groceries	11,900

The number of units reflected above are estimates and may vary once final grants are issued.

B. Objectives

Respondents should state in measurable, quantifiable terms the service and outcome objectives they will achieve in providing these services. The major purpose of objectives is to measure quantity, quality, and impact of services. In measuring these areas, a balance should be created between the value of the information and the time/effort required to collect the information. The objectives stated in the proposal may be incorporated as part of the program's evaluation plan.

1. Services Objectives

As part of the proposal, the respondent will be required to develop specific service objectives that measure the quantity and other aspects of services. The objectives should state the target quantities and match the program services as proposed.

- The respondent must include a target number of **unduplicated consumers** to be served through the program for which they are submitting a proposal.
- Below are the additional service objectives required for each nutrition services program solicited through this RFP.

Nutrition Services	Unit of Service,
Congregate Nutrition Services, Dine-in Meals for Older Adults	Number of Dine-in Meals
Congregate Nutrition Services, Dine-in Meals for Adults with Disabilities	Number of Dine-in Meals
Congregate Nutrition Services, To-go meals for Older Adults	Number of To-go Meals
Congregate Nutrition Services, To-go Meals for Adults with Disabilities	Number of To-go Meals
Congregate Nutrition Services, CHAMPS for Older Adults	Number of CHAMPSS Meals
Home Delivered Nutrition Services for Older Adults	Number of Home-Delivered Meals
Home Delivered Nutrition Services for Adults with Disabilities	Number of Home-Delivered Meals
Emergency Home-Delivered Meal Program	Number of Emergency Home-Delivered Meals
Culturally Responsive Supplemental Grocery Program	Number of Culturally Responsive Supplemental Bags of Groceries

2. Outcome Objectives

As part of the proposal, the respondent will be required to develop specific outcome objectives that demonstrate and measure the impact, outcomes, or results of services. Both quantitative and qualitative analysis shall be applied to measure program efficiency and effectiveness. The outcome objectives specified below will be required for each grant.

Congregate Nutrition Services Dine-in meal program for older adults and adults with disabilities, and CHAMPSS meal program for older adults

- Consumers report increased consumption of fruits, vegetables, and/or whole grains.
Target: 75%
- Consumers feel less worried about getting enough food to meet their needs. Target: 85%
- Clients rate the quality of food they received as excellent or good. Target: 85%
- Clients feel a greater sense of connection to their community. Target: 85%
- Clients report the food support they received helps them live stably in the community.
Target: 85%

Congregate Nutrition Services To-go meal program for older adults and adults with disabilities

- a. Consumers report increased consumption of fruits, vegetables, and/or whole grains. Target: 75%
- b. Consumers feel less worried about getting enough food to meet their needs. Target: 85%
- c. Clients rate the quality of food they received as excellent or good. Target: 85%
- d. Clients report the food support they received helps them live stably in the community. Target: 85%

Home-Delivered Nutrition Services for older adults, adults with disabilities, and the citywide emergency meal program

- a. Consumers report increased consumption of fruits, vegetables, and/or whole grains. Target: 75%
- b. Consumers feel less worried about getting enough food to meet their needs. Target: 85%
- c. Clients rate the quality of food they received as excellent or good. Target: 85%
- d. Clients report the food support they received helps them live stably in the community. Target: 85%

Culturally Responsive Supplemental Grocery Program

- a. Consumers report increased consumption of fruits, vegetables, and/or whole grains. Target: 75%
- b. Consumers feel less worried about getting enough food to meet their needs. Target: 85%
- c. Clients rate the quality of food they received as excellent or good. Target: 85%
- d. Clients report the food support they received helps them live stably in the community. Target: 85%
- e. Clients feel the food support they received is inclusive of their cultural food preferences. Target: 85%

C. Reporting Requirements

- a) Grantee shall enter all service objectives into the SF DAS GetCare Service Unit section by the 5th working day of the month for the preceding month.
- b) Grantee shall enter monthly reports and metrics into the CARBON database system by the 15th of the following month, ensuring the accuracy and timeliness of these entries. Each report must include:
 - The number of unduplicated consumers served
 - The total units of service provided
- c) Grantee shall enter the annual outcome objective metrics into the CARBON database by the 15th of the month following the end of the program year.
- d) Grantee shall issue a Fiscal Closeout Report at the end of each fiscal year. This report is due to SFHSA no later than July 31 of each grant year and must be submitted through the CARBON system.
- e) Grantee shall provide DAS OCP with summary reports of Sexual Orientation and Gender Identity (SOGI) data collected during the year, to be submitted two times per year. The due dates for these reports are July 10 and January 10.

- f) Grantee shall develop and deliver ad hoc reports as requested by SFHSA and DAS.

III. SUBMISSION REQUIREMENTS

A. Time and Place for Submission of Proposals

Proposers shall submit one (1) electronic pdf copy of the proposal and one (1) electronic Excel copy of the budget to Candace.Gray@sfgov.org and HSARFP@sfgov.org. Electronic file title should include RFP number, agency name, number of files submitted i.e. 1 of 4. Proposals must be received by 3:00 p.m. on **February 24, 2025**. Late submissions will not be considered. Supplemental documents or revisions after the deadline will not be accepted.

Department staff will confirm receipt of all Respondent submissions within one (1) business day after the deadline for receipt noted above.

B. Format

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel); typed in a 12-point serif font (i.e. Times New Roman, not Arial); text should be double-spaced and unjustified (i.e., with a ragged-right margin); page margins should be at least 1" on all sides (excluding headers and footers).

C. Content

Organizations interested in responding to this RFP must submit the following information, in the order specified below. All proposals for funding must be developed using the format below. This is necessary so that all proposals can receive fair and equal evaluation. Proposals not following the required format will not be considered for funding. Information must be at a level of detail that enables effective evaluation and comparison between proposals by the Proposal Evaluation Panel. The Respondent must ensure that the proposal addresses the Selection Criteria.

1. Table of Contents

Each proposal package should contain a complete table of contents showing page numbers. All pages in the package must be numbered consecutively, and major sections must be indexed.

2. RFP Cover Page – (use form provided in Section IX)

Submit the cover page signed by a person authorized to obligate the organization to perform the commitments contained in the proposal. Submission of this document will constitute a representation by the organization that the organization is willing and able to perform the commitments contained in the proposal.

3. Minimum Qualifications – up to 3 pages

All agencies submitting proposals for funding must provide a *Minimum Qualifications Documentation* describing in detail how the proposing agency meets each of the Minimum Qualifications. Any proposals failing to demonstrate these qualifications will be considered non-responsive and will not be eligible for proposal review/award. (refer to section IV, Item A)

4. Contracts/Grants (both public and private) – up to 2 pages

Agencies should submit a statement listing relevant contracts and grants with a description of the services which have been completed during the last three (3) years. The statement must also list any failure or refusal to complete a contract or grant,

including details and dates. Include any unresolved and/or outstanding findings from any program or fiscal/compliance visits done by the City. If no outstanding issues, provide a statement that your agency is in full compliance with program and fiscal monitoring. Provide disclosure of any litigation including Respondent, subcontracts, or any principal officers thereof in connection with any contract or grant.

5. Organizational Capacity – up to 5 pages (not including resumes/job

descriptions) Description of your agency's ability to deliver the services proposed in this RFP. In addition, please address the following:

- a) Briefly explain how your organization is qualified to implement the proposed services. Demonstrate your management/supervisory infrastructure, as well as your administrative/financial capacity to deliver the proposed services.
- b) Describe your experience with/history of successfully providing these services, and serving this population/community. Describe recently completed projects, including quality, requirements, timelines, and/or success. Demonstrate ability to implement new programming and/or services.
- c) Describe the staffing patterns needed to provide the proposed services. Clearly identify whether services will be performed by existing staff or by proposed staff. Attach job descriptions and resumes of key program staff and clearly identify which staff position they occupy. Provide written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's prior approval. Describe relevant staff training plans to ensure services are provided in an efficient manner and service and outcome objectives are being achieved.
- d) A description of the organization's plans, strategies, and activities to address racial equity, cultural competence and inclusion among staff and program participants, as well as internal controls to regularly review current practices through the lens of racial equity and inclusion to identify areas of improvement, including cultural and linguistic competencies, related to working with the identified Target Population and the envisioned program design. Describe agency's language and cultural capacity.
- e) Complete the Disability Checklist (Attachment 4)

6. Program Approach – up to 10 pages

Description of your agency's specific program approach to deliver the services proposed in this RFP. In addition, please address the following:

- a) Describe your specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations in this RFP (be sure to address all applicable items listed in Target Population, Scope of Work, and Service and Outcome Objectives). Include the proposed menu(s) along with a nutrient analysis for at least two weeks of the menu (Attachment 5 menu compliance template). Describe the linkages that will connect clients to services.
- b) Identify the proposed site that will be made available for the target population. Explain how the facility/site is appropriate for the services proposed. Describe plan for location and hours of programming and/or services. Include Site Chart (Attachment 3).
- c) Identify any subcontractors and describe their responsibilities in the delivery of services. Provide MOU or letter of intent.

- d) List and explain the specific service and outcome objectives to be accomplished and how they will be measured. Describe methods for data collection, documentation, and reporting on service and outcome objectives.
- e) Describe the proposed model for clients to offer input regarding program design, service delivery and program operations.

7. Fiscal Capacity (Budget) – up to 6 pages on form provided (excluding cost allocation plan and audited financial statement)

Please refer to the instructions outlined in Section XI and use only SFHSA approved budget forms. Provide Cost Allocation Plan and current audited financial statements. SFHSA intends to award this grant to respondents that it considers will provide the best overall program services at a reasonable pricing structure. SFHSA reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

Using the budget forms, please provide the direct expenses for all proposed costs to be supported through this grant. Respondents must also provide a Budget Justification that clearly explains the basis for each expense listed in the budget.

Discuss any planned leveraging of other resources (i.e., fund raising, in-kind contributions, volunteers, etc.), if any, to support the program approach proposed. Identify external resources committed to this program, including in-kind resources designated solely for this program. Assign a dollar value for all external resources.

Nutrition Services	Appendix
Congregate Nutrition Services for Older Adults (OCNP, Dine-in meals-C1 and To-go meals-C2)	B
Congregate Nutrition Services for Adults with Disabilities (Dine-in and To-go meals)	B
Congregate Nutrition Services CHAMPSS - Choosing Healthy Appetizing Meal Plan Solutions for Seniors (OCNP, Dine-in meals-C1)	B
Nutrition Compliance and Quality Assurance for Congregate Nutrition Services	B
Home-Delivered Nutrition Services for Older Adults (OCNP-C2)	B1
HDM Nutrition Services for Adults with Disabilities (Include budget for required NCQA component and optional NCQA nutrition counseling and annual assessment component here)	B1
Home-Delivered Nutrition Services for Adults with Disabilities	B1
Emergency Home-Delivered Nutrition Services for Older Adults and Adults with Disabilities	B1
Nutrition Compliance and Quality Assurance for Home-Delivered Nutrition Services, including nutrition service assessments and nutrition service reassessments	B1
Culturally Responsive Supplemental Grocery Program	B2

8. Completed Page Number Form (refer to Section X)

IV. PROPOSAL EVALUATION CRITERIA

A. Minimum Qualifications (Pass/Fail)

Proposers must provide documentation that clearly demonstrates each Minimum Qualification (MQ) listed below has been met at time of submission. Minimum Qualification documentation should be clearly marked as “MQ1”, MQ2”, etc. to indicate which MQ it supports. Each Proposal will be reviewed for initial determination on whether Proposer meets the MQs referenced in this section. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

MQ #	Description
MQ1	Proposer has three (3) years of experience providing congregate and/or home-delivered nutrition services to the target population of older adults or people with disabilities as described in the RFP.
MQ2	A nonprofit organization with a 501(c)(3) determination and/or equivalent.
MQ3	Must be willing and able to comply with the City contracting requirements set forth in Section VIII of this RFP.
MQ4	Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within ten (10) days of notice of award.

Proposals should clearly demonstrate that the qualifications are met. Insufficient or incomplete information may result in a proposal being considered non-responsive and may not be eligible for award of the grant.

Please note: Agencies submitting proposals that have previously contracted with the City and County of San Francisco and/ or Federal agencies to provide goods and/or services must successfully demonstrate compliance with performance/monitoring requirements specified in previous grants/contracts (corrective actions) in order to be considered responsive to this RFP. **Documented failure to correct performance/monitoring deficiencies identified in past City and County grants/contracts may result in Agency disqualification to participate in this RFP.** Provide a statement of any unresolved and/or outstanding findings from any program or fiscal/compliance visits done by the City. If no outstanding issues, provide a statement that your agency is in full compliance with program and fiscal monitoring. (Refer to section III.C.4)

B. Selection Criteria

The proposals will be evaluated by a selection committee comprised of parties with expertise in the service areas identified in this RFP. The City intends to evaluate the proposals generally in accordance with the criteria itemized below.

Total Possible Points: 100

Organizational Capacity (40 points)

- 1) Did respondent explain how the organization is qualified to implement the proposed services? Did they demonstrate the management/supervisory infrastructure, as well as the administrative/financial capacity to deliver the proposed services? (10 points)
- 2) Did respondent describe experience with/history of successfully providing these services, and serving this population/community? Were recently completed projects listed,

detailing quality, requirements, timelines, and/or success? Did they demonstrate ability to implement new programming and/or services? Satisfactorily completed Disability **Checklist (Attachment 4)** (15 points)

- 3) Based on the staffing patterns described, will the program be sufficiently staffed? Based on job descriptions and qualifications, does the staff have the necessary skill, training, and experience to successfully provide the services to these clients and community? Do job descriptions include appropriate experience/qualifications for the project, realistic description of tasks to be performed, reasonable workload/ work schedule? Were relevant staff training plans clearly described? (10 points)
- 4) Does the agency clearly demonstrate how racial equity and cultural competence values are exemplified through their organizational and program operations? This should include a description of the organization's plans, strategies, and activities to address racial equity and inclusion among staff and program participants, as well as internal controls to regularly review current practices through the lens of racial equity and inclusion to identify areas of improvement. Do they address the agency's language and cultural capacity? (5 points)

Program Approach (35 points)

- 1) Does the respondent clearly describe the agency's specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations in this RFP? Did they address Target Population, Scope of Work, and Service/Outcome Objectives? Did the respondent include a menu(s) with a nutrition analysis for at least two weeks (**Attachment 5 menu compliance template**)? Do the meals on the menu align with the specified cuisine type in the respondent's application? Are the meals complete, meeting nutritional and portion requirements? Are the meals and food likely to be well-received by the target population? Does the respondent clearly describe the linkages that will connect clients to services? (15 points)
- 2) Is the proposed facility/site that will be made available for the target population appropriate for the services proposed? Does respondent have a plan for location and hours of programming and/or services? Did respondent include a Site Chart (**Attachment 3**)? (5 points)
- 3) Does the respondent describe specific service and outcome objectives to be accomplished and how they will be measured? Does the respondent include an explanation of methods for data collection, documentation, and reporting on service and outcome objectives? Are any subcontractors identified? If so, are their responsibilities in the delivery of services clearly defined? Did respondent provide an MOU or letter of intent? (10 points)
- 4) Does the proposed model include methods for clients to offer input regarding program design, service delivery and program operations? (5 points)

Fiscal Capacity (25 points)

- 1) Does the budget reflect sound, adequate allocation of resources, matching the program components including staffing costs, operating costs and capital costs (as appropriate)? Is the budget correct and easy to understand? (10 points)

- 2) Are the overall costs reasonable, and competitive with other proposals? Are specific costs reasonable, justified, and competitive? Does the cost allocation support the services as proposed? (10 points)
- 3) Does respondent describe their ability to leverage other resources for this program, either from in-kind, and/or external resources? Does the proposal reflect the effective use of organizational resources/external resources, including funds leveraged exclusively for this program? (5 points)

V. PRE-PROPOSAL CONFERENCE AND GRANT AWARD

A. Pre-Proposal Conference

Proposers are encouraged to attend a Pre-Proposal Conference on January 10, 2025, at 1:00 pm to be held via teleconference. All questions will be addressed at this conference and any available new information will be provided at that time. If you have further questions regarding the RFP, please contact the individual designated in Section VI. A.

B. Award

SFHSA will select a proposer with whom Agency staff shall commence grant negotiations. The selected proposal will be part of the final grant and will be used as a starting point for negotiations. The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further negotiations and approvals before the City may be legally bound thereby. SFHSA may negotiate modifications after the bid/proposal has been selected to assure that all necessary program requirements are covered before the grant is signed. If a satisfactory grant cannot be negotiated in a reasonable time, SFHSA, in its sole discretion, may terminate negotiations with the highest ranked proposer and begin grant negotiations with the next highest ranked proposer.

C. Written Questions and Requests for Clarification

Proposers are encouraged to submit written questions to Candace.Gray@sfgov.org and HSARFP@sfgov.org. All questions will be addressed and any available new information will be provided in writing via email to proposers. All written questions must be submitted on or prior to January 14, 2025, at 3:00pm.

VI. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

A. Inquiries Regarding RFP

All inquiries regarding the RFP or clarification of the RFP, must be directed to: Candace.Gray@sfgov.org and HSARFP@sfgov.org

B. How to Register as a City Supplier

The following requirements pertain only to Proposers not currently registered with the City as a Supplier.

Step 1: Register as a BIDDER at City's Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

Step 2: Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit Chapter 12B and

12C forms through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **San Francisco Labor Code 131 and 132 Inquiries:** For questions concerning the San Francisco Labor Code 131 and 132 Equal Benefits and Non-Discrimination in Contracting requirements, go to: www.sfgov.org/cmd

C. Proposal Questions and Submissions

1. Proposer Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to Candace.Gray@sfgov.org and HSARFP@sfgov.org. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to Candace.Gray@sfgov.org and HSARFP@sfgov.org no later than Written Questions Due Date.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>.

2. Proposal Format

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel); typed in a 12-point serif font (i.e. Times New Roman, not Arial); text should be double-spaced and unjustified (i.e., with a ragged-right margin); page margins should be at least 1" on all sides (excluding headers and footers). Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact the evaluation of your Proposal.

3. Time and Place for Submission of Proposals

Proposers shall submit one (1) electronic pdf copy of the proposal and one (1) electronic Excel copy of the budget to Candace.Gray@sfgov.org and HSARFP@sfgov.org. Electronic file title should include RFP number, agency name, number of files submitted i.e., 1 of 4. Proposals must be received by 3pm, on February 24, 2025. Late submissions will not be considered. Supplemental documents or revisions after the deadline will not be accepted.

Department staff will confirm receipt of all Respondent submissions within one (1) working day after the deadline for receipt noted above.

D. Proposal Addenda

The City may modify this Solicitation, prior to the Proposal Due Date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Addenda issued by the City prior to the Proposal Due Date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal Due Date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any

Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

THE SUBMITTAL OF A RESPONSE TO THIS SOLICITATION SHALL EXPLICITLY STIPULATE ACCEPTANCE BY PROPOSERS OF THE TERMS FOUND IN THIS SOLICITATION, ANY AND ALL ADDENDA ISSUED TO THIS SOLICITATION, AND THE PROPOSED GRANT TERMS.

E. Public Disclosure

All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this Administrative Code provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit.

If the City receives a Public Records Request ("Request") pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure ("Response Date"). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production ("Withholding Directive"), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

F. Limitation on Communications During Solicitation

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer's control, shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee – is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

G. Proposal Selection Shall Not Imply Acceptance

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

H. Cybersecurity Risk Assessment

As part of City's evaluation process, City may engage in Cybersecurity Risk Assessment (CRA). CRA may be performed for each entity manufacturing the product, performing technical functions related to the product's performance, and/or accessing City's networks and systems.

Where a prime grantee or reseller plays an active role in each of these activities, CRA may also be required for the prime grantee or reseller.

To conduct a CRA, City may collect as part of this Solicitation process one of the following two reports:

- **SOC-2 Type 2 Report:** Report on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy; or
- **City's Cyber Risk Assessment Questionnaire:** Proposer's responses to a City's Cyber Risk Assessment Questionnaire.

The above reports may be requested at such time City has selected or is considering a potential Proposer. The reports will be evaluated by the soliciting Department and the City's Department of Technology to identify existing or potential cyber risks to City. Should such risks be identified, City may shall afford a potential Proposer an opportunity to cure such risk within a period of time deemed reasonable to City. Such remediation and continuing compliance shall be subject to City's on-going review and audit through industry-standard methodologies, including but not limited to: on-site visits, review of the entities' cybersecurity program, penetration testing, and/or code reviews.

I. Solicitation Errors and Omissions

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

J. Objections to Solicitation Terms

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the City setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

K. Notice of Intent to Award-Required Documentation

After the City issues a Notice of Intent to Award, and before award, if requested by the City, the successful Proposer must possess all qualifications required for the contract. Any failure to demonstrate satisfaction of one or more of following requirements, if requested by the City, will be considered sufficient for the disqualification of the Proposer as nonresponsive and will entitle the City to terminate negotiations and move to the next highest ranked Proposer for award.

1. Proposer is registered in the System of Award Management (SAM) and has no exclusions (<https://usfcr.com/search-sam-cage-duns/>) ;
2. Proposer is in good standing with the California Secretary of State (<https://bizfileonline.sos.ca.gov/search/business>);
3. Proposer is in good standing with the Franchise Tax Board (<https://webapp.ftb.ca.gov/eletter/?Submit=Check+Status>);
4. Proposer is in good standing with the Internal Revenue Service (<https://apps.irs.gov/app/eos/>) ;

5. Proposer is in good standing with California Attorney General's Registry of Charitable Trusts (<https://rct.doj.ca.gov/Verification/Web/Search.aspx?facility=Y>)
 - a. To receive a grant under this Solicitation, any nonprofit proposer must be in good standing with the California Attorney General's Registry of Charitable Trusts by the time of grant execution and must remain in good standing during the term of the agreement. Upon request, proposer must provide documentation to the City demonstrating its good standing with applicable legal requirements. If proposer will use any nonprofit subgrantees to perform the agreement, proposer will be responsible for ensuring they are also in compliance with all requirements of the Attorney General's Registry of Charitable Trusts at the time of grant execution and for the duration of the agreement.

Note: Proposer's failure to remain in good standing with the above after award will entitle the City to immediately terminate the contract for default with no opportunity for the Proposer to cure.

L. Protest Procedures

1. Protest of Non-Responsiveness Determination

Within three (3) business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsiveness. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

2. Protest of Award

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

3. Protest of Contract Award

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

4. Delivery of Protests

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by email to Candace.Gray@sfgov.org and

HSARFP@sfgov.org and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

Executive Director
Human Services Agency
P.O. Box 7988
San Francisco, CA 94120
Trent.Rhorer@sfgov.org

M. Proposal Term

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal Due Date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.

N. Revision to Proposal

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal Due Date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal Due Date for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

O. Proposal Errors and Omissions

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

P. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

Q. Proposer's Obligations under the Campaign Reform Ordinance

If a contract awarded pursuant to this Solicitation has (A) a value of \$100,000 or more in a fiscal year and (B) requires the approval of an elected City official, Proposers are hereby advised:

1. Submission of a Proposal in response to this Solicitation may subject the Proposers to restrictions under Campaign and Governmental Conduct Code Section 1.126, which prohibits City contractors, Proposers, and their affiliates from making political contributions to certain City elective officers and candidates; and

2. Before submitting a Proposal in response to this Solicitation, Proposers are required to notify their affiliates and subcontractors listed in the awarded contract or Proposal of the political contribution restrictions set forth in Campaign and Governmental Conduct Code section 1.126.

This restriction applies to the party seeking the contract, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded; or (2) twelve months have elapsed since the award of the contract.

A violation of Section 1.126 may result in criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at (415) 252-3100 or go to <https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders>.

R. Reservations of Rights by the City

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
5. Procure any materials, equipment or services specified in this Solicitation by any other means; or
6. Determine that the subject goods or services are no longer necessary.

S. No Waiver

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

T. Other

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:

- a. Any condition set forth in this Solicitation;
- b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
- c. Delivery time(s).

2. City reserves the right to inspect an awarded Proposer's place of business prior to award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.

3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.

4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.

5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.

U. Local Business Enterprise Goals and Outreach

Per Section 14B.2 of the Admin Code, Chapter 14B requirements do not apply to grants, whether funded by the City or by Federal or State grant funds, to a nonprofit entity to provide services to the community.

VII. CITY'S SOCIAL AND ECONOMIC POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social and Economic Policy Requirements"). These Social and Economic Policy Requirements set forth below, which Proposers are encouraged to carefully review. The Social and Economic Policy Requirements set forth below are not intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it.

A. Proposers Unable to do Business with the City

1. Generally

Proposers that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below.

2. San Francisco Labor and Employment Code Article 131.2

A Proposer selected pursuant to this Solicitation may not, during the term of the Agreement, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local

law authorizing such registration, subject to the conditions set forth in Article 131.2(b) of the San Francisco Labor and Employment Code.

B. Minimum Compensation Ordinance

A Proposer selected pursuant to this Solicitation shall comply with Labor and Employment Code Article 111. A Proposer selected pursuant to this Solicitation shall pay covered employees no less than the minimum compensation required by San Francisco Labor and Employment Code Article 111, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Article 111. Information about and the text of the Article 111 is available on the web at <https://www.sf.gov/information/minimum-compensation-ordinance>.

C. First Source Hiring Program

A proposer selected pursuant to this solicitation shall comply with all of the provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code that apply to this agreement and an awarded proposer is subject to the enforcement and penalty provisions in Chapter 83.

D. Other Social Policy Provisions

Attachment 1, City's Contract Terms, identifies the City's applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

VIII. GRANT REQUIREMENTS

A. Grant Terms and Negotiations

The successful Proposer will be required to enter into the Agreement in the form attached hereto as Attachment 1, City's Proposed Agreement Terms. **City's Proposed Agreement Terms are attached in the Attachment 1: Grant Agreement (form G-100).** However, Proposers may identify those contract terms to which they object as part of the questions they submit by the Questions Due Date. City shall evaluate all objections and determine what, if any changes, will be incorporated into City's Contract Terms prior to the Proposal Due Date. Any such changes will be made known to all Proposers through an Addendum to this Solicitation. Failure to timely execute the Proposed Agreement, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the Proposed Agreement, shall be deemed an abandonment of the Proposal and City, in its sole discretion, may select another Proposer and proceed against the original selectee for damages.

B. Insurance Requirements

1. Types and Amounts of Coverage. Without limiting Grantee's liability, Grantee shall maintain in force, during the full term of the grant agreement, insurance in the following amounts and coverages. Limits of

insurance may be increased according to the Scope of Work, risk, and amount of contract:

- a. Workers' Compensation, in statutory amounts, with Employers' Liability Limits not less than one million dollars (\$1,000,000) each accident, injury, or illness.
- b. Commercial General Liability Insurance with limits not less than \$1,000,000 each occurrence and \$2,000,000 general aggregate for Bodily Injury and Property Damage, including Contractual Liability, Personal Injury, Products and Completed Operations. Policy must include Abuse and Molestation coverage.
- c. Commercial Automobile Liability Insurance with limits not less than one million dollars (\$1,000,000) each occurrence Combined Single Limit for Bodily Injury and Property Damage, including Owned, Non-Owned and Hired auto coverage, as applicable.

If professionals are used as part of the grant agreement, professional liability will be required:

- d. Professional liability insurance for negligent acts, errors or omission with respect to professional or technical services, if any, required in the performance of this Agreement with limits not less than one million dollars (\$1,000,000) each claim.

Grantees that will provide technology type services must provide Technology Errors and Omissions Liability insurance. Limits of insurance may be increased according to the Scope of Work, risk, and amount of contract:

- e. Technology Errors and Omissions Liability coverage, with limits of \$1,000,000 each occurrence and each loss, and \$2,000,000 general aggregate. The policy shall at a minimum cover professional misconduct or lack of the requisite skill required for the performance of services defined in the contract and shall also provide coverage for the following risks:
 - i. Liability arising from theft, dissemination, and/or use of confidential information, including but not limited to, bank and credit card account information or personal information, such as name, address, social security numbers, confidential social service information, protected health information or other personally identifying information, stored or transmitted in electronic form;
 - ii. Network security liability arising from the unauthorized access to, use of, or tampering with computers or computer systems, including hacker attacks; and
 - iii. Liability arising from the introduction of any form of malicious software including computer viruses into, or otherwise causing damage to the City's or third person's computer, computer system, network, or similar computer

related property and the data, software, and programs thereon.

2. Additional Requirements for General and Automobile Coverage. Commercial General Liability and Commercial Automobile Liability insurance policies shall:
 - a. Name as additional insured City and its officers, agents and employees.
 - b. Provide that such policies are primary insurance to any other insurance available to the Additional Insureds, with respect to any claims arising out of this Agreement, and that insurance applies separately to each insured against whom claim is made or suit is brought, except with respect to limits of liability.
3. Additional Requirements for All Policies. All policies shall be endorsed to provide at least thirty (30) days' advance written notice to City of cancellation of policy for any reason, nonrenewal or reduction in coverage and specific notice mailed to City's address for notices pursuant to Article 15.
4. Required Post-Expiration Coverage. Should any of the insurance required hereunder be provided under a claims-made form, Grantee shall maintain such coverage continuously throughout the term of this Agreement and, without lapse, for a period of three (3) years beyond the expiration or termination of this Agreement, to the effect that, should occurrences during the term hereof give rise to claims made after expiration or termination of the Agreement, such claims shall be covered by such claims-made policies.
5. General Annual Aggregate Limit/Inclusion of Claims Investigation or Legal Defense Costs. Should any of the insurance required hereunder be provided under a form of coverage that includes a general annual aggregate limit or provides that claims investigation or legal defense costs be included in such general annual aggregate limit, such general annual aggregate limit shall be double the occurrence or claims limits specified above.
6. Evidence of Insurance. Before commencing any operations under this Agreement, Grantee shall furnish to City certificates of insurance, and additional insured policy endorsements, in form and with insurers satisfactory to City, evidencing all coverages set forth above, and shall furnish complete copies of policies promptly upon City's request. Before commencing any operations under this Agreement, Grantee shall furnish to City certificates of insurance and additional insured policy endorsements with insurers with ratings comparable to A-, VIII or higher, that are authorized to do business in the State of California, and that are satisfactory to City, in form evidencing all coverages set forth above.

Failure to maintain insurance shall constitute a material breach of this Agreement.

7. Effect of Approval. Approval of any insurance by City shall not relieve or decrease the liability of Grantee hereunder.
8. Insurance for Subcontractors and Evidence of this Insurance. If a subcontractor will be used to complete any portion of this agreement, the grantee shall ensure that the subcontractor shall provide all necessary insurance and shall name the City and County of San Francisco, its officers, agents, and employees and the grantee listed as additional insureds.
9. Regarding Workers' Compensation, Contractor hereby agrees to waive subrogation which any insurer of Contractor may acquire from Contractor by virtue of the payment of any loss. Contractor agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation. The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the City for all work performed by the Contractor, its employees, agents and subcontractors.
10. Should any required insurance lapse during the term of this Agreement, requests for payments originating after such lapse shall not be processed until the City receives satisfactory evidence of reinstated coverage as required by this Agreement, effective as of the lapse date. If insurance is not reinstated, the City may, at its sole option, terminate this Agreement effective on the date of such lapse of insurance.

C. Failure to Provide Insurance and/or Bonds

Unless otherwise stated, within ten business days of the receipt of a notice of award of a Contract, the Proposer to whom the RFP is awarded shall deliver the specified bond documents and/or insurance certificates and policy endorsements to City. If the Proposer fails or refuses to furnish the required bond and/or insurance within ten days after receiving notice to award a Contract, City may, at its option, determine that the Proposer has abandoned its Proposal. The foregoing in no way limits the damages which are recoverable by City whether or not defined elsewhere in the contract documents.

D. Compliance with Other Laws

Proposers shall keep itself fully informed of City's Charter, codes, ordinances and regulations and all state, and federal laws, rules and regulations affecting the performance of the Grant Agreement and shall at all times comply with such Charter codes, ordinances, and regulations rules and laws.

E. HSA/DAS Policy Manuals and Memoranda

<https://www.sfhhsa.org/partner/policies-and-procedures>

F. Other CDA Rules and Regulations (if applicable)

State (CDA Regulations):

https://www.aging.ca.gov/programsproviders/aaa/Laws_Regulations_Policies/

Federal OMB Uniform Guidance: <https://www.grants.gov/learn-grants/grant-policies/omb-uniform-guidance-2014.html>

Code of Federal Regulations: <https://www.govinfo.gov/help/cfr>

IX. RFP COVER PAGE Congregate nutrition services for older adults

NAME OF ORGANIZATION: _____

ADDRESS: _____

DIRECTOR: _____

PHONE: _____

EMAIL: _____

CITY SUPPLIER ID (IF KNOWN) _____

**FEDERAL EMPLOYER
IDENTIFICATION NUMBER (FEIN):** _____

ANNUAL AMOUNT
REQUESTED for Congregate
Nutrition Services for Older Adults
(please use budget template B): \$ _____

Congregate Nutrition Services for Older Adults

Cuisine Type	Supervisor District	Annual Amount
Total		

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

X. RFP COVER PAGE CONGREGATE NUTRITION SERVICES FOR ADULTS WITH DISABILITIES

NAME OF ORGANIZATION: _____

ADDRESS: _____

DIRECTOR: _____

PHONE: _____

EMAIL: _____

CITY SUPPLIER ID (IF KNOWN) _____

FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN): _____

ANNUAL AMOUNT
REQUESTED for Congregate
Nutrition Services for Adults with
Disabilities (please use budget
template B): \$ _____

Congregate Nutrition Services for Adults with Disabilities		
Cuisine Type	Supervisor District	Annual Amount
Total		

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

**XI. RFP COVER PAGE CONGREGATE NUTRITION SERVICES CHAMPSS-
CHOOSING HEALTHY APPETIZING MEAL PLAN SOLUTIONS FOR
SENIORS**

NAME OF ORGANIZATION: _____

ADDRESS: _____

DIRECTOR: _____

PHONE: _____

EMAIL: _____

CITY SUPPLIER ID (IF KNOWN) _____

**FEDERAL EMPLOYER
IDENTIFICATION NUMBER (FEIN):** _____

ANNUAL AMOUNT
REQUESTED for Congregate
Nutrition Services CHAMPSS-
Choosing Healthy Appetizing Meal
Plan Solutions for Seniors (please
use budget template B): \$ _____

**Congregate Nutrition Services CHAMPSS-Choosing Healthy Appetizing Meal Plan
Solutions for Seniors**

Cuisine Type	Supervisor District	Annual Amount
Total		

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

**XII. RFP COVER PAGE NUTRITION COMPLIANCE AND QUALITY ASSURANCE
FOR CONGREGATE NUTRITION SERVICES**

NAME OF ORGANIZATION: _____

ADDRESS: _____

DIRECTOR: _____

PHONE: _____

EMAIL: _____

CITY SUPPLIER ID (IF KNOWN) _____

**FEDERAL EMPLOYER
IDENTIFICATION NUMBER (FEIN):** _____

ANNUAL AMOUNT
REQUESTED for Nutrition
Compliance and Quality Assurance
for Congregate Nutrition Services
(please use budget template B): \$ _____

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

XIII. RFP COVER PAGE- HOME-DELIVERED NUTRITION SERVICES FOR

NAME OF ORGANIZATION: _____

ADDRESS: _____

DIRECTOR: _____

PHONE: _____

EMAIL: _____

CITY SUPPLIER ID (IF KNOWN) _____

**FEDERAL EMPLOYER
IDENTIFICATION NUMBER (FEIN):** _____

OLDER ADULTS

ANNUAL AMOUNT
REQUESTED for Home-Delivered
Nutrition Services for Older Adults
(please use budget template B1): \$ _____

Home-Delivered Nutrition Services for Older Adults

Cuisine Type	Annual Amount
Total	

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for

120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

XIV. RFP COVER PAGE- Home-delivered nutrition services for Adults with Disabilities

NAME OF ORGANIZATION:

ADDRESS:

DIRECTOR:

PHONE:

EMAIL:

CITY SUPPLIER ID (IF KNOWN)

FEDERAL EMPLOYER

IDENTIFICATION NUMBER (FEIN):

ANNUAL AMOUNT

REQUESTED for Home-Delivered
Nutrition Services for Adults with
Disabilities (please use budget
template B1):

\$

Home-Delivered Nutrition Services for Adults with Disabilities

Cuisine Type	Annual Amount
Total	

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

XV. RFP COVER PAGE- EMERGENCY HOME-DELIVERED NUTRITION SERVICES FOR OLDER ADULTS AND ADULTS WITH DISABILITIES

NAME OF ORGANIZATION: _____

ADDRESS: _____

DIRECTOR: _____

PHONE: _____

EMAIL: _____

CITY SUPPLIER ID (IF KNOWN) _____

**FEDERAL EMPLOYER
IDENTIFICATION NUMBER (FEIN):** _____

ANNUAL AMOUNT
REQUESTED for Emergency
home-delivered nutrition services
for older adults and adults with
disabilities (please use budget
template B1):

\$ _____

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

**XVI. RFP COVER PAGE- NUTRITION COMPLIANCE AND QUALITY
ASSURANCE FOR HOME-DELIVERED NUTRITION SERVICES, INCLUDING
NUTRITION SERVICE ASSESSMENTS AND NUTRITION SERVICE
REASSESSMENTS**

NAME OF ORGANIZATION: _____

ADDRESS: _____

DIRECTOR: _____

PHONE: _____

EMAIL: _____

CITY SUPPLIER ID (IF KNOWN) _____

**FEDERAL EMPLOYER
IDENTIFICATION NUMBER (FEIN):** _____

ANNUAL AMOUNT
REQUESTED for Nutrition
compliance and quality assurance
for home-delivered nutrition
services, including nutrition service
assessments and nutrition service
reassessments (please use budget
template B1): \$ _____

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

**XVII. RFP COVER PAGE- CULTURALLY RESPONSIVE SUPPLEMENTAL
GROCERY PROGRAM**

NAME OF ORGANIZATION: _____

ADDRESS: _____

DIRECTOR: _____

PHONE: _____

EMAIL: _____

CITY SUPPLIER ID (IF KNOWN) _____

**FEDERAL EMPLOYER
IDENTIFICATION NUMBER (FEIN):** _____

ANNUAL AMOUNT
REQUESTED for Nutrition
compliance and quality assurance
for home-delivered nutrition
services, including nutrition service
assessments and nutrition service
reassessments (please use budget
template B2): \$ _____

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the grant negotiation; that a grant may be negotiated for a portion of the amount requested; and that there is no grant until a written grant has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to Candace.Gray@sfgov.org and HSARFP@sfgov.org

XVIII. PAGE NUMBER FORM

This form is to assist the review panel in finding the information in the Proposal that corresponds to the evaluation criteria. For each item listed below, please list the page number(s) where the reviewer may find the answer(s) to the criteria.

	Evaluation and Selection Criteria	
	Minimum Qualifications	Page Number(s)
MQ1.	Proposer has three (3) years of experience providing congregate and/or home-delivered nutrition services to the target population of older adults or people with disabilities as described in the RFP.	
MQ2.	A nonprofit organization with a 501(c)(3) determination and/or equivalent	
MQ3.	Must be willing and able to comply with the City contracting requirements set forth in Section VIII of this RFP.	
MQ4.	Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within ten (10) days of notice of award.	
	Organizational Capacity (40 points)	
A1.	Does respondent explain how the organization is qualified to implement the proposed services? Did they demonstrate the management/supervisory infrastructure, as well as the administrative/financial capacity to deliver the proposed services? (10 points)	
A2.	Did respondent describe experience with/history of successfully providing these services, and serving this population/community? Were recently completed projects listed, detailing quality, requirements, timelines, and/or success? Did they demonstrate ability to implement new programming and/or services? Satisfactorily completed Disability Checklist (Attachment 4) (5 points) (15 points)	
A3.	Based on the staffing patterns described, will the program be sufficiently staffed? Based on job descriptions and qualifications, does the staff have the necessary skill, training, and experience to successfully provide the services to these clients and community? Do job descriptions include appropriate experience/qualifications for the project, realistic description of tasks to be performed, reasonable workload/ work schedule? Were relevant staff training plans clearly described? (10 points)	
A4	Does the agency clearly demonstrate how racial equity and cultural competence values are exemplified through their organizational and program operations? This should include a description of the organization's plans, strategies, and activities to address racial equity and inclusion among staff and program participants, as well as internal controls to regularly review current practices through the lens of racial equity and inclusion to identify areas of improvement. Do they address the agency's language and cultural capacity? (5 points)	
	Program Approach (35 points)	
B1.	Does the respondent clearly describe the agency's specific program approach to deliver the service components proposed and how this program	

	approach or service model will appropriately address the needs of the target populations in this RFP? Did they address Target Population, Scope of Work, and Service/Outcome Objectives? Did the respondent include a menu(s) with a nutrient analysis for at least two weeks (Attachment 5 menu compliance template)? Do the meals on the menu align with the specified cuisine type in the respondent's application? Are the meals complete, meeting nutritional and portion requirements? Are the meals and food likely to be well-received by the target population? Does the respondent clearly describe the linkages that will connect clients to services? (15 points)	
B2.	Is the proposed facility/site that will be made available for the target population appropriate for the services proposed? Does respondent have a plan for location and hours of programming and/or services? Did respondent include a Site Chart (Attachment 3)? (5 points)	
B3.	Does the respondent describe specific service and outcome objectives to be accomplished and how they will be measured? Does the respondent include an explanation of methods for data collection, documentation, and reporting on service and outcome objectives? Are any subcontractors identified? If so, are their responsibilities in the delivery of services clearly defined? Did respondent provide an MOU or letter of intent? (10 points)	
B4.	Does the proposed model include methods for clients to offer input regarding program design, service delivery and program operations? (5 points)	
	Fiscal Capacity (25 points)	
C1.	Does the budget reflect sound, adequate allocation of resources, matching the program components including staffing costs, operating costs and capital costs (as appropriate)? Is the budget correct and easy to understand? (10 points)	
C2.	Are the overall costs reasonable, and competitive with other proposals? Are specific costs reasonable, justified, and competitive? Does the cost allocation support the services as proposed? (10 points)	
C3.	Does respondent describe their ability to leverage other resources for this program, either from in-kind, and/or external resources? Does the proposal reflect the effective use of organizational resources/external resources, including funds leveraged exclusively for this program? (5 points)	

XIX. BUDGET FORMS AND INSTRUCTIONS

Budgets should be submitted in the standard SFHSA format. Forms are available at:

<https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>

Click on “Human Services Agency” in the Department drop-down menu and then click the link for this RFP.

The attached spreadsheets are in Excel. There are six (6) tabs: Budget Summary, Salaries and Benefits, Operating-Direct, Subcontractors-Pass Thru, Capital Expenses, and Justification.

Please note these must all be clearly and easily attributable to the specific program being funded.

The Budget Justification should be a narrative, providing detailed information and calculations supporting the amount allocated for each budget line item. Please detail all mathematical computations for each line item. Show how the total dollar amount was derived, e.g., the number of square feet of office space to be utilized multiplied by the rate per square foot, the cost per month for insurance multiplied by the number of months in the grant term, etc. For the Salaries and Benefits section, list the position, a brief sentence of the position's responsibilities, the basis for the percentage of FTE allocated to the activity, and the mathematical computation used to arrive at the total dollar amount. Also list everything being included under Fringe Benefits.

The Cost Allocation Plan is required. Respondents must follow the City’s cost allocation guidelines for nonprofit grantees, which largely follow those described by Generally Accepted Accounting Principles (GAAP) and in Federal OMB Circular A-122. The plan should include how indirect costs were calculated.

For any proposed Subcontracts over \$25,000, attach a separate detailed Subcontracting budget using the standard SFHSA format. Provide a brief explanation of the subcontracting arrangement, as well as a budget breakdown. Please note, the total subcontractor budget amount should appear on the Subcontractors-Pass Thru sheet.

Indirect rates are not allowable on Subcontractor indirect expenditures, Subcontracts over \$25,000, Capital Expenses, or Direct Client Pass-Through payments: aid payments, direct voucher payments, or any stipend, subsidy or expense paid on behalf of a client (i.e., security deposit, rental payment assistance, transportation vouchers, etc.). These examples are not intended to be a comprehensive list.

These guidelines provide general information. If further clarification or technical assistance is required, email Candace.Gray@sfgov.org and HSARFP@sfgov.org on or prior to January 14, 2025.



San Francisco Ethics Commission

25 Van Ness Avenue, Suite 220, San Francisco, CA 94102

Phone: 415.252.3100 . Fax: 415.252.3112

ethics.commission@sfgov.org . www.sfethics.org

Received On:

File #: 250579

Bid/RFP #: 1177

Notification of Contract Approval

SFEC Form 126(f)4

(S.F. Campaign and Governmental Conduct Code § 1.126(f)4)

A Public Document

Each City elective officer who approves a contract that has a total anticipated or actual value of \$100,000 or more must file this form with the Ethics Commission within five business days of approval by: (a) the City elective officer, (b) any board on which the City elective officer serves, or (c) the board of any state agency on which an appointee of the City elective officer serves. For more information, see: <https://sfethics.org/compliance/city-officers/contract-approval-city-officers>

1. FILING INFORMATION

TYPE OF FILING

Original

DATE OF ORIGINAL FILING (for amendment only)

AMENDMENT DESCRIPTION – Explain reason for amendment

2. CITY ELECTIVE OFFICE OR BOARD

OFFICE OR BOARD

Board of Supervisors

NAME OF CITY ELECTIVE OFFICER

Members

3. FILER'S CONTACT

NAME OF FILER'S CONTACT

Angela Calvillo

TELEPHONE NUMBER

415-554-5184

FULL DEPARTMENT NAME

Office of the Clerk of the Board

EMAIL

Board.of.Supervisors@sfgov.org

4. CONTRACTING DEPARTMENT CONTACT

NAME OF DEPARTMENTAL CONTACT

Tahir Shaikh

DEPARTMENT CONTACT TELEPHONE NUMBER

415-557-6085

FULL DEPARTMENT NAME

045 Human Services Agency

DEPARTMENT CONTACT EMAIL

tahir.shaikh@sfgov.org

5. CONTRACTOR	
NAME OF CONTRACTOR Self-Help for the Elderly	TELEPHONE NUMBER 4156777600
STREET ADDRESS (including City, State and Zip Code) 731 Sansome Street, Suite 100, San Francisco, CA 94111	EMAIL

6. CONTRACT		
DATE CONTRACT WAS APPROVED BY THE CITY ELECTIVE OFFICER(S)	ORIGINAL BID/RFP NUMBER 1177	FILE NUMBER (If applicable) 250579
DESCRIPTION OF AMOUNT OF CONTRACT \$11,125,299		
NATURE OF THE CONTRACT (Please describe) The purpose of this grant is to provide congregate nutrition services to older adults in an in-person congregate setting. Services include meals, nutrition education, nutrition risk screening, and opportunities for socialization. Congregate nutrition services support individuals to live independently in their own homes and communities, help ensure health and well-being through improved nutrition and reduced isolation and serve as an access point for other home and community-based services.		

7. COMMENTS

8. CONTRACT APPROVAL	
This contract was approved by:	
☐	THE CITY ELECTIVE OFFICER(S) IDENTIFIED ON THIS FORM
☒	A BOARD ON WHICH THE CITY ELECTIVE OFFICER(S) SERVES Board of Supervisors
☐	THE BOARD OF A STATE AGENCY ON WHICH AN APPOINTEE OF THE CITY ELECTIVE OFFICER(S) IDENTIFIED ON THIS FORM SITS

9. AFFILIATES AND SUBCONTRACTORS

List the names of (A) members of the contractor's board of directors; (B) the contractor's principal officers, including chief executive officer, chief financial officer, chief operating officer, or other persons with similar titles; (C) any individual or entity who has an ownership interest of 10 percent or more in the contractor; and (D) any subcontractor listed in the bid or contract.

#	LAST NAME/ENTITY/SUBCONTRACTOR	FIRST NAME	TYPE
1	Chung	Anni	CEO
2	Nait	Leny	CFO
3	Au	Yat-Pat	Other Principal Officer
4	Lau	Joseph	Other Principal Officer
5	Mui	Magdalen	Other Principal Officer
6	Wong	Vicky	Other Principal Officer
7	Chang	Mary	Other Principal Officer
8	Lee	Jerry	Other Principal Officer
9	Schulte	William	Other Principal Officer
10	Zen	Paul	Other Principal Officer
11	Chen	Angel	Other Principal Officer
12	Jay	Nicholas	Other Principal Officer
13	Li	Dominic	Other Principal Officer
14	Sum	Dickson	Other Principal Officer
15	Chang	Tilly	Other Principal Officer
16	Low	Dr. Randal	Other Principal Officer
17	Wong	Sebastian	Other Principal Officer
18	Kaung	Janie	Other Principal Officer
19			

9. AFFILIATES AND SUBCONTRACTORS

List the names of (A) members of the contractor's board of directors; (B) the contractor's principal officers, including chief executive officer, chief financial officer, chief operating officer, or other persons with similar titles; (C) any individual or entity who has an ownership interest of 10 percent or more in the contractor; and (D) any subcontractor listed in the bid or contract.

#	LAST NAME/ENTITY/SUBCONTRACTOR	FIRST NAME	TYPE
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9. AFFILIATES AND SUBCONTRACTORS

List the names of (A) members of the contractor's board of directors; (B) the contractor's principal officers, including chief executive officer, chief financial officer, chief operating officer, or other persons with similar titles; (C) any individual or entity who has an ownership interest of 10 percent or more in the contractor; and (D) any subcontractor listed in the bid or contract.

#	LAST NAME/ENTITY/SUBCONTRACTOR	FIRST NAME	TYPE
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☐ Check this box if you need to include additional names. Please submit a separate form with complete information. Select "Supplemental" for filing type.

10. VERIFICATION

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information I have provided here is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

SIGNATURE OF CITY ELECTIVE OFFICER OR BOARD SECRETARY OR CLERK

DATE SIGNED

BOS Clerk of the Board



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

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

May 19, 2025

Angela Calvillo, Clerk of the Board
Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
San Francisco, CA 94102-4689

Department of Benefits
and Family Support

Department of Disability
and Aging Services

RE: Proposed Resolution for the grant agreement with Self-Help for the Elderly for the Provision of Nutrition Services for Older Adults

Dear Ms. Calvillo:

Enclosed for the Board of Supervisors' consideration and approval, please find a resolution which will authorize the grant agreement between the City and County of San Francisco and Self-Help for the Elderly for an amount not to exceed \$11,125,299 for the period from July 1, 2025 to June 30, 2029.

The purpose of this grant is to provide congregate nutrition services to older adults in an in-person congregate setting. Services include meals, nutrition education, nutrition risk screening, and opportunities for socialization. Congregate nutrition services support individuals to live independently in their own homes and communities, help ensure health and well-being through improved nutrition and reduced isolation and serve as an access point for other home and community-based services.

Because the contract is over \$10,000,000, the Department is requesting approval from the Board of Supervisors in accordance with the Section 9.118 of the Charter.

If you need additional information, please contact Tahir Shaikh, Contract Manager at tahir.shaikh@sfgov.org.

Attached please find a copy of the proposed resolution and supporting documents. Please calendar this item at the Board's earliest convenience and advise us of the date of introduction.



Daniel Lurie
Mayor

Trent Rhorer
Executive Director, SFHSA

Kelly Dearman
Executive Director, DAS



SAN FRANCISCO
HUMAN SERVICES AGENCY

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

Thank you for your assistance.

Respectfully,

DocuSigned by:

1848251CBC914C2...
Kelly Dearman
Executive Director
Department of Disability and Aging Services

Enclosures

