



***REQUEST FOR PROPOSAL (RFP)***  
***NUTRITION SERVICES-FULL BID***  
***JULY 1, 2026 TO JUNE 30, 2027***  
***PART 2-ATTACHMENTS***

## **SERVICES, STANDARDS, AND DEFINITIONS**

### Attachment A

This exhibit addresses the meal services requested in this contract, the minimum standards expected for all programs that may be funded by Young at Heart Resources, and the service definitions.

The standards referenced in this exhibit are supported by the Missouri Code of State Regulations (CSR's) and are minimum requirements along with 19 CSR 15-7.010 & 19 CSR 15-4.245 for services provided through Young at Heart Resources funding.

Eligibility for services provided by Title III of the Older Americans Act is limited to those individuals 60 years of age or older or as specified in the service standards (CSR). Eligibility for services funded by other sources is limited to those individuals 60 years of age or older and may, on a limited basis, be open to individuals 18-59 years of age with a permanent disability.

All units of service are based upon one (1) meal. The unit price for one (1) meal shall be based on the approved menus and submissions may not exceed the maximum price per meal unit. Unit price includes the total cost of food, milk, packaging, condiments, utensils, transportation, and all other related costs.

Young at Heart Resources will consider the lowest cost per meal, and the best proposal. Young at Heart Resources does reserve the right to reject any or all SFY 2027 Requests for Proposal. The organization must clearly establish its ability to provide quality meals on a daily basis throughout the year.

### **SERVICES REQUESTED**

#### **NUTRITION SERVICES**

Nutrition Services – The proposal covers the preparation, handling, distribution, and delivery of congregate and home delivered meals. Separate bids for each category of service may be submitted. Home delivered bids will be for both regular and Medicaid funded meals.

The services for bid include:

- A. Congregate Meals
- B. Home Delivered Meals (delivered to the client's home, hot, and/or frozen)
- C. Meals, Other – shelf stable

UNIT OF SERVICE: One (1) meal.

**Meal Description:****CONGREGATE MEAL (CM)**

A dietitian/nutritionist-approved hot or frozen meal, prepared daily, and served to eligible clients on a daily basis (M-F), throughout the year.

**HOME-DELIVERED HOT MEAL (HDM)**

A dietitian/ nutritionist-approved hot or frozen meal, prepared daily, and delivered pre-plated to authorized clients, face to face and at the individual's place of residence. Meals shall be delivered daily (M-F), throughout the year unless they are frozen meals which shall be delivered at least weekly.

**HOME-DELIVERED FROZEN MEALS (HDFM)**

A dietitian/nutritionist-approved meal, pre-plated, frozen and delivered face to face to authorized homebound clients, at the individual's place of residence.

All meals shall furnish one-third of the dietary reference intake as required by the National Elderly Nutrition Program.

Weekly/bi-weekly meal delivery is based upon client need and should include health-specific menu options. Deliveries must be made in accordance with authorization, delivered to the residence of the Home Delivered Meal client using sanitary procedures. All meals to be delivered to any address in the service area and, when appropriate, the driver should be able to accommodate most reasonable delivery requests (i.e. deliver to the back door, buzz apt. 213, etc.). **Meals are never permitted to be left with the neighbor, in coolers, apartment managers, etc.** If the individual is unavailable for delivery that day, the individual should make the organization aware before meal delivery. **The organization should establish a policy and procedure that is communicated to the meal recipient before services are established.** Meals should be available within two days of authorization. All items must be in packaging that is easily opened so that meal preparation is simple for the meal recipient and packaged in transportable containers. Each individual meal must be labeled with the use by/expiration date; and have a refrigerator life of at least 14 days from delivery date. The driver must have the meal recipient sign the route sheet before the meal is considered delivered. If the recipient is unable to sign the route sheet, then the driver must still observe the meal recipient, and the caregiver can sign the route sheet.

**HOME-DELIVERED EMERGENCY MEALS – SHELF STABLE (SS)**

Shelf-stable meals consisting of a 2 oz. meat product, two vegetables, fruit, two starches (one being a whole grain), and dry milk/cocoa packet are required in order that home

delivered clients have meals on hand for weather related or other emergencies that prevent hot meal delivery to homebound clients. The contractor shall prepare and deliver these meals to authorized clients at the individual's place of residence during the first quarter and shall be replaced as needed throughout the year to ensure there are at least three emergency shelf stable meals available throughout the year. Young at Heart Resources will be invoiced separately once the meals are delivered. If the individual refuses the shelf stable meal, then the organization must make sure the individual has enough food available for emergencies and provide the individual with a form to sign noting the refusal of needing or wanting shelf stable meals. This form shall be uploaded into AgingIS. Separate bids are required for these meals.

**Minimum Standards:**

These standards apply to all categories of service unless otherwise specified. A mutually agreed upon solution will be set prior to the start of service. If the standard is not consistent with the approved operational plan for service, it is the organization's responsibility to identify what requires mediation or waiver.

**Meal Requirements:**

The organization agrees to provide meals pursuant to the rules and regulations as described in this document and will ensure that all meals meet the minimum nutritional value and content requirements.

When specified, condiments in the form of ketchup, mustard, salad dressing, relish, etc., are to be part of the meal unit. If the individual refuses the condiments there must be an "opt out" form signed by the individual, stating they do not want condiments served with the meal. The form must be uploaded into AgingIS.

**Menu Planning:**

Menu planning will be accomplished either through a registered dietitian with Kohls Wholesale, at no cost to the organization, or by an outside registered dietitian at the organization's expense. There will be two (2) six-month menu cycles annually. Each menu cycle will consist of six (6) 30-day menus, along with a list of approved substitutions.

The organization agrees to electronically submit menus monthly for review. The menu cycle for the upcoming month is due during the third week of the prior month. For example, the February menu is due on the third Friday of January.

All menus will comply with the Dietary Reference Intakes and the Dietary Guidelines for Americans. The organization will use standardized recipes to ensure consistent quality and quantity. Reimbursement for unauthorized meal changes will be disallowed.

### **Special Diet Meals:**

The organization agrees to provide special diets as needed. Given the number of meals produced each day, it is extremely difficult to provide all clients with special requests. The following list of special accommodation is expected:

- vegetarian diet
- no beef
- no pork
- no fish

Please note that *pureed* and *mechanical/soft* diets WILL be offered. The needs for those individuals that have food allergies, health, or religious diet restrictions will also be met.

### **Pre-Approved Menu Substitution Items for Organization:**

When menu substitutions are necessary, the organization must follow the pre-approved menu substitution items and notify Young at Heart Resources with a C-6 form, uploaded into AgingIS or another source identified by YAHR monthly. If immediate approval is not available and a quick decision has to be made on the same day of service, the following are menu substitutions that can be made without immediately informing Young at Heart Resources.

#### **Meats**

*Certain dishes (i.e. chili mac, turkey and dumplings, etc.) can have meats and starches mixed together. In other rice and pasta dishes (i.e. beef stroganoff with noodles, sweet and sour chicken over rice, etc.), the starch must be on the bottom with the meat sauce or gravy on top, instead of being mixed together. Serving sizes must contain at least 2 oz. of meat with these dishes. All other single meat servings must be 3 oz.*

#### **Fruits and Vegetables**

*If it is a vegetable/fruit, check the list to see if it is a vitamin C or vitamin A vegetable/fruit from the following list and substitute another fruit or vegetable from the available list. (Notice some fruits/vegetables are high in both vitamins C and A.*

*An asterisk will be next to these vegetables and fruits so they can be selected quickly.)*

**High/Good Source of Vitamin A Vegetables**

*Greens\*, broccoli\*, sweet potato\*, winter squash, tomatoes\*, lettuce (dark leaves)\*, carrots, mixed vegetables, spinach, red peppers*

**High/Good Sources of Vitamin C Vegetables**

*Greens\*, broccoli\*, sweet potatoes\*, enriched or dehydrated potatoes enriched with vitamin C, cabbage, Brussels sprouts, cauliflower, green/red peppers, lettuce (dark leaves)\*; tomatoes\**

**High/Good Source of Vitamin A Fruit**

*Apricots, peaches, cantaloupe\*, Mandarin oranges.*

**High/Good Source of Vitamin C Fruit**

*Fresh oranges/orange juice, V8\* (low sodium), tomato juice\* (low sodium), pineapple juice, cantaloupe\*, strawberries*

*If the fruit or vegetables on the menu is not high in vitamin A or C, then other fruits or vegetables can be substituted if a healthier selection from the above list is preferred. Every effort should be made to match fresh fruit with another fresh fruit if possible.*

**Milk**

*Can substitute 2% or skim milk for 1% milk.*

**Grains**

*Rice and noodles/pastas can be exchanged with each other at any time. Wheat bread, white rice, bread, rolls, and corn bread can be exchanged with each other at any time. If the starch is a whole grain, every effort should be made to substitute another whole grain in its place.*

**Salads**

*No substitutions. Serve as on menu. If not available on the day needed, then just serve later in the same week.*

**Desserts**

*If it is a fruit dessert, substitute another fruit high in vitamin C or A. Fruit bars can be exchanged with each other. If any other dessert (i.e., fruit for apple crisp) is not available, substitute fresh/canned fruit.*

**Supervision and Inspection:**

The contractor shall provide management supervision at all times and maintain constant quality control inspection to check for portion size, appearance, and packaging, in addition to the quality of products.

**Requirements for Handling Prepared Foods**

The time and temperature of each food item must be taken and recorded on the Out of Oven Temperature form as the food is removed from the oven.

A two (2) ounce separate sample of each time/temperature control for safety food (TCS) served shall be refrigerated and kept at least seventy-two (72) hours. Sample(s) shall be available to Young at Heart Resources or for analysis by the Department of Health if a food-borne illness is suspected.

Time/temperature control for safety food (TCS) which has been held at one hundred forty degrees (140 ° F) or higher for over four (4) hours or between forty degrees and one hundred forty degrees (40 ° - 140 ° F) for two (2) hours and any prepared food that has lost its quality shall not be served and shall be discarded.

Proper cooling of food should follow the Missouri Food Code section 3-501.14.

**Facility and Equipment Requirements:**

The facility shall have an adequate number of refrigerators, ovens, ranges, counter space, and storage appropriate for food preparation.

Proper equipment shall be used to maintain hot foods at or above one hundred forty degrees Fahrenheit (140 ° F) and cold foods at or below forty degrees Fahrenheit (40 ° F) while serving. Hot and cold food temperatures shall be checked immediately prior to service and recorded daily. Records must be kept for two (2) years. A product thermometer must be available at all times and used to check internal food temperatures.

When cooling, food shall be placed no more than two inches (2”) deep in a container, covered, and immediately placed in the refrigerator or freezer so it will cool to forty degrees (40 ° F) or below as rapidly as possible. Once food is cooled to forty degrees (40 ° F) or below, it may be stored in a container more than two inches (2”) deep.

When transporting prepared foods, all hot food shall be delivered at temperatures that are maintained throughout a three and one-half (3 ½) hour period following end preparation time to delivery to a client. For home delivered meals this limit includes the time required for packaging foods by the contractor, transporting them to the centers,

holding time at the center, repackaging meals for home-delivered meal recipients and transporting them to the home.

Hot foods delivered to the center shall be at a minimum temperature of one hundred forty degrees Fahrenheit (140° F) and cold foods shall be at forty degrees Fahrenheit (40° F) and below. A daily record of the delivery time and temperature of the food when received shall be kept at each center. Records must be kept for three (3) years.

The facility shall have an adequate number of hand-washing sinks near food preparation areas.

Disposable towels and soap must be available at the hand-washing sink in the kitchen.

A hand-washing sign must be posted in the restroom.

A federal, state, or local health certificate for the local food distribution facilities to be used under this contract must be provided at bid submission.

Methods of insect and rodent control shall be used on a regularly scheduled basis.

**Deliveries and Packaging:**

A hot unitized meal will be delivered in packaging approved by Young at Heart Resources. Meals will be delivered in insulated carriers that are easy to clean and sanitize along with hot bricks, or another method to maintain the proper temperatures throughout the delivery to clients. All entrées will be hot enough to maintain the proper temperatures throughout the delivery to meal recipients in their homes. Other items (balance of food, condiments, utensils, etc.) must be packaged as a separate unit from the hot unitized component. Hot packages must be suitable for maintaining meals at temperatures in accordance with local health standards. Containers and overlays should have an airtight closure, be of non-toxic materials, and be capable of withstanding temperatures of 400° F or higher. Meal tray should be able to reheat in either microwave or conventional oven.

Cold portion containers and overlay should be leak proof plastic and non-toxic. Milk and other juices are to be furnished in disposable, individual containers. All cold items must be kept at approved temperatures in accordance with local health standards. All cold foods must be delivered in an insulated carrier, easy to clean, and sanitized with cold packs.

**Food Storage Requirements:**

- a. Cleaning supplies and clearly labeled pesticides shall be stored in separate locations from food products.
- b. Food products shall be stored at least six inches (6”) above the floor;
- c. Dry food storage shall be well-ventilated, away from direct sunlight, and maintained between fifty degrees Fahrenheit and seventy degrees Fahrenheit (50° F-70° F);
- d. All refrigerated foods shall be maintained at or below forty degrees (40° F);

- e. Frozen foods shall be maintained at or below zero degree Fahrenheit (0 ° F);
- f. Inventory of all foods shall be depleted on a first-in/first-out basis;
- g. Adequate transportation for all foods shall be provided as required; and
- h. Thermometers shall be kept in each refrigerator and freezer, and temperatures shall be checked and recorded daily. Records must be kept for three (3) years.

**Monitoring:**

Monitoring will be performed annually at a minimum. Young at Heart Resources or an authorized designee has the right to monitor at any time without advance notice. Young at Heart Resources staff needs the ability to gain access to the facility immediately or within five (5) minutes of the request for access. The monitor will:

- a. Inspect food to determine compliance with specifications and reject food not meeting specifications;
- b. Have access to the contractor's purchase records regarding the food purchased for the Young at Heart Resources meal program;
- c. Observe food preparation, food handling, food storage, food temperature, and food packaging.

**Health and Sanitation Requirements:**

At all times, including while being stored, prepared, displayed, served, or transported, food shall be protected from potential contamination, including dust, insects, rodents, unclean equipment and utensils, and unnecessary handling, coughs and sneezes, flooding, draining, and overhead leakage or overhead dripping from condensation. The temperature of time/ temperature for safety food (TCS) shall be 40° F or below at all times. Refrigerated storage – TCS food to be transported shall be pre-chilled and held at a temperature of 40° F or below 40°. Hot storage – TCS food to be transported shall be held at a temperature of 140° F or above.

Hot, TCS food requiring refrigeration storage overnight shall be rapidly cooled to an internal temperature of 40° F or less, utilizing such methods as shallow pans, agitation, quick chilling, or water circulation external to the food container so that the cooling period shall not exceed four hours.

TCS foods that have been cooked and then refrigerated shall be reheated rapidly to 165° F or higher throughout before being served or before being placed in a hot food storage container. Steam tables, warmers, and similar hot food holding methods are prohibited for the rapid re-heating of potentially hazardous foods.

The temperature requirements for TCS foods, as stated, are mandatory. Unless temperature requirements are met during the transportation and storage, the food shall not be delivered. Only meals meeting minimum U.S. Dept of Agriculture specifications are eligible for reimbursement.

Specific Requirements include:

- a. Personnel with symptoms of communicable disease or open or infected wounds shall not be permitted to handle food. All paid staff involved in meal preparation will have a Hepatitis A vaccination if required by their local health department.
- b. All food handlers shall use effective hair restraints. Effective restraints are devices which both cover and hold hair, such as clean hair nets, caps, hats, and bandanas. Hair spray is not an acceptable hair restraint.
- c. Equipment and work areas shall routinely be cleaned and sanitized according to a posted, written cleaning schedule.
- d. Disposables shall be discarded by a locally approved sanitary method.
- e. If a garbage disposal is not used, waste shall be kept in leak-proof containers with close fitting lids and disposed of daily. Waste containers shall be cleaned daily.
- f. Dishes and utensils washed in water temperatures of less than one hundred fifty degrees Fahrenheit (150° F) and rinsed at less than one hundred eighty degree Fahrenheit (180° F) shall be chemically sanitized when single-tank stationary rack and door-type machine using chemicals for sanitizing are used. The wash water shall not be less than one hundred twenty degrees Fahrenheit (120° F) and rinse water not less than seventy-five degrees Fahrenheit (75° F). If the dishwashing machine uses hot water for sanitizing, the wash water shall be at least one hundred fifty degrees Fahrenheit (150° F) and the final rinse at least one hundred-eighty degrees Fahrenheit (180° F). A test kit or other device that accurately measures the parts per million concentration of the solutions shall be provided and used.
- g. All dishes and utensils shall be air dried.

**Noncompliance:**

Young at Heart Resources reserves the right to inspect and determine the quality of the food delivered and reject meals which do not comply with the requirements and specifications of the contract. The contractor shall not be paid for:

- a. unauthorized menu changes; meals that do not meet the meal pattern requirements
- b. incomplete meals
- c. meals not delivered within the specified delivery time listed in the Request for Proposal

Payment for meals funded by Young at Heart Resources may be disallowed upon request by any authorized Young at Heart Resources personnel who determines that the organization is in violation of Young at Heart Resources nutrition standards, other regulations, or acceptable health standards, including but not limited to preparation, delivery, and consumption of all meals.

When meals are to be disallowed, or when Young at Heart Resources staff determines that meals are in violation of nutritional standards, the following procedures are to be followed:

- a. Young at Heart Resources staff notifies the organization of the violation and allows the organization to correct the violation within an acceptable time frame;
- b. If the violation is corrected to the satisfaction of Young at Heart Resources staff there will be no meal disallowance;
- c. If the organization cannot correct the violation within an acceptable time frame or to the satisfaction of Young at Heart Resources staff, staff then:
  1. Notifies the organization that the meals are being reported for disallowance;
  2. Notifies Young at Heart Resources fiscal department of the violation and the intent to disallow the specified meals; and
  3. Completes and signs a Meal Disallowance Report, and sends it to Young at Heart Resources fiscal department. Young at Heart Resources fiscal department will make two (2) copies. The original copy is retained at Young at Heart Resources for processing and filing; one (1) copy is sent to the organization.

When the Young at Heart Resources monitor or an authorized designee determines that meals are in violation of Young at Heart Resources nutrition standards, other regulations, or health practices:

- a. A Young at Heart Resources representative notifies the contractor of the violation, and allows the contractor to correct the violation within an acceptable time frame;
- b. If the violation is corrected within the acceptable time frame and to the satisfaction of a Young at Heart Resources authorized representative, there will be no meal disallowance;
- c. If the organization cannot correct the violation within an acceptable time frame, a Young at Heart Resources representative follows the above disallowance procedures.

**Declared and Unforeseen Emergencies (including inclement weather):**

In the event of an emergency or disaster, as determined by Young at Heart Resources, this contract shall remain in effect.

In the event of unforeseen emergency circumstances affecting meal production or delivery, the contractor shall immediately notify Young at Heart Resources by telephone and/or email of the following:

- The impossibility of providing services
- The circumstances precluding service provision; and
- A statement of whether or not successive service deliveries will be affected.

## **STANDARDS**

### **Recommended Food Specification and Meal Quality**

The following specifications and standards are to be used as a guide for the organization. This guidance is not designed to hamper the creative nature of the individual organization but to set expectations for nutritious, well designed and produced meals. Changes that are radically different should be discussed with Young at Heart Resources authorized staff.

#### **Meat/Meat Alternative/Entrees:**

**Note:** All food prepared/purchased must be prepared/purchased with limited fat (fats that are made from vegetable oils [i.e. canola, corn, cotton seed, olive, safflower, soybean and sunflower] are required and limit fats derived from animal fats [i.e. butter, margarine, whole milk to name a few]). Sugar shall be limited and no salt should be added unless salt is used as an ingredient to make the product of good quality.

#### **Hamburger/Cheese Pizza**

Pizza will have 2-3 ounces of cooked meat or meat alternate to credit the 2-3 ounce meat requirement, and the pizza crust must be credited to equal one bread serving.

#### **Chicken Strips (white meat only)**

One-half ounce (1/2 oz.) fully cooked and browned, consisting of boneless chicken breasts in 1/2 ounce seasoned, breaded portions. Each serving must contain eight (8) one-half ounce nuggets to meet the required edible portion.

#### **Cheeseburger**

Minimum cooked edible serving size is 3 ounces. Ground beef patties, frozen, regular. 4 ounces, no less than 80% lean/20% fat. No evidence of freezing or defrosting. Product shall show no evidence of mishandling and shall be in excellent condition at time of delivery.

Low fat cheese – 0.5 oz. pasteurized blend of low-fat cheeses from USDA-approved plant. Low fat includes but is not limited to reduced fat cheddar, Monterey Jack, provolone, and parmesan.

**Macaroni and Cheese (can be an all-wheat product)**

Purchase units 10, 15, 20 – pound cartons

Major ingredients: Noodle products are prepared by dry formed units of dough made from semolina, durum flour, farina, enriched flour or any combination of two or more of these with liquid eggs, frozen eggs, dried eggs, egg yolks, frozen yolks, dried yolks, or any combination of two or more of these with or without water. Optional ingredients may include seasonings such as onion, garlic, etc., gum gluten and selected acceptable chemical compound. Products must be enriched, containing thiamin, riboflavin, niacin, and iron. Cheese must be made from low fat cheeses (i.e. reduced fat cheddar, Monterey Jack, provolone and parmesan, etc.).

**Chicken, oven fried**

U.S. Grade A processed in a plant operating under the Food and Safety and Quality Services (FSQS), meat and poultry grading program of AMS, USDA. Minimum cooked edible serving size of meat is 3 ounces U.S. Grade A. A wing must be added to a drumstick or thigh to ensure 3 ounces. Meat is exclusive of skin and bone.

The batter/breading shall consist of an enriched flour-type base with other ingredients as needed to produce a desirable texture, flavor, and color. Non salt seasoning (i.e., Ms. Dash, garlic and onion powders, etc.) can be added to enhance the flavor of food.

Chicken must be oven fried in vegetable oil, not deep fat fried. The finished oven fried chicken should have an internal temperature of 185° F for dark meat and 180° F for white meat.

**Bar-B-Que Riblett**

Rib shaped pork patty, 3 ounces, each fully cooked and browned, consisting of pork and no more than 5% soy protein.

Bar-b-que sauce should be of a typical bar-b-que flavor, mildly seasoned, and free from foreign matter.

**Turkey Breast**

U.S. Grade A processed in a plant operating under the Food and Safety and Quality Services (FSQS), meat and poultry grading program of AMS, USDA. Turkeys should be frozen to bring the internal temperature at the center of the package to 0 degrees Fahrenheit or below within 72 hours from the time of entering the freezer. The frozen turkey shall be a uniform weight and light color.

**Spaghetti and Meatballs**

Spaghetti should be made of enriched flour products. (This can be an all-wheat product.)

Meatball – Two or more meatballs to total 3 ounces cooked edible meat. Hamburger (ground beef). Pound, fresh, USDA utility or better; no less than 80% lean/20% fat.

Spaghetti Sauce – should be of a tomato base/tomato sauce, #10 cans. U.S. Grade A. Fine texture. Good ripe tomato color, free from defects. Typical tomato paste flavor, free from scorched, bitter, green tomato flavor, and objectionable odors.

Hamburger (ground beef)

Pound, fresh, USDA utility or better; no less than 80% lean/20% fat. Meat should not exceed 50 ° F during grinding and packaging.

Frankfurter (turkey franks)/Smoked Sausage

Minimum cooked edible serving size is 3-ounce 8 links per pound. Major ingredients turkey breast, all poultry products. Links should be 5 to 6 inches in length. Prepared from select turkey, carefully blended with natural spices and seasonings.

Roast Beef

Grade USDA or better. Surface flat: maximum average thickness - 1/4-inch, maximum at any one point-1/2 inch. The beef shall be of good color, normal to the grade, be free of bruises, blood clots, bone dust, ragged edges, and discoloration. The roast beef shall have no evidence of mishandling and shall be in excellent condition at the time of delivery.

Ham

Minimum serving size is one or more slices to equal quantity as specified in the menu.

Chili with Beans

Purchase USDA

Major ingredients: water, beef, bean, oat flour, tomato paste, soy protein, modified food starch, spices, sugar, garlic juice, onion juice, natural flavor and color, caramel color, citric acid, and garlic powder.

Eggs (fresh, shell)

Purchase units: dozen/30 dozen per case or half cases of 15 dozen.

Size: small to medium

Grade: U.S. Grade AA and A when appearance is important. U.S. Grade B for general cooking and baking. Recommended points for specifications: Product shall consist of fresh, natural, or shell protected eggs held under appropriate temperature and humidity conditions. Products shall be uniform in size, clean sound, shelled, edible, and free from foreign odors or flavors.

**Milk/Milk Products:**

(All cheeses must be low fat or reduced fat cheeses.)

1. Swiss processed – Firm ripened, melted, pasteurized blend of cheese and emulsifiers. Buy USDA processed cheese from USDA-approved plant.
2. Cheddar – U.S. Grade AA, not more than 39% moisture, not less than 50% milk fat on the solid basis. Possess a clean, pleasing, nut-like flavor, and a compact body and texture, aged over 6 months.
3. American & Processed – Melted, pasteurized blend of cheese and emulsifiers. Buy USDA-processed cheese from USDA-approved plant.
4. Yogurt (plain, sweetened, or flavored) – can be used as a meat/milk alternative for snacks. Requirements include 6–8-ounce cups.
5. Nonfat Dry Milk – Not more than 5% moisture and not more than 1-1/2 milk fat, unless otherwise specified. U.S. Extra Grade. Fortified. The product must yield reconstituted fluid milk having 2,000 International Units of Vitamin A and 400 International Units of Vitamin D per quart.

**Vegetables:**

(All vegetables except beans must be purchased fresh or frozen.)

1. Frozen Carrots

Style: diced/sliced

Grade: U.S. Grade A (fancy)

Carrots should have a typical, bright, orange-yellow color and be not more than slightly affected by green units. Units should be free from defects and mechanical injury. Carrots that are blemished by black or brown discolorations and unpeeled units should be avoided. Carrots should have a tender uniform texture and be firm, but fibrous. Flavor and odor should be normal. Watch for off color showing a grayish or brownish cast, excessive number of pale carrots, presence of tough or woody carrots showing softness, poor trimming and peeling, deep cuts resulting from insect or mechanical injury.

2. Mashed Potatoes

Purchase Units: burlap sacks, 50 or 100 pounds

Paper cartons or 10, 15, 20, 25, or 50 pound paper bags

Select well-shaped, smooth, reasonably clean, firm potatoes free from cuts, bruises, green skins, other blemishes, and decay. Decidedly green areas may cause bitter flavor. Deep penetrating bruises or small wormholes can cause excessive waste.

Watch for badly sprouted or soft, flabby potatoes, which are unsatisfactory. May use frozen potatoes. Season with small amounts of butter or magazine, without salt added,

spices and pepper to desired and acceptable texture and taste. 1% milk can be added to provide smooth richer taste.

3. Broccoli

Purchase Units: 2 or 2-1/2 pound packages, 12 per case

Style: spears less than 10% stalk

Grade: U.S.B.

Broccoli should have reasonably good color (maybe variable but not off-color) and be reasonably free from defects such as discoloration. Watch for dull off-colored units. Off flavor to odor. Federal Spec No. FHHH-V-1745/4.

4. Coleslaw

Cabbage should be free of insects and bad blemishes. Coleslaw should be fresh, crisp, and mildly seasoned, and should hold shape and not contain too much liquid. It is mandatory that shredded carrots be added to coleslaw as part of the vegetable requirement. (Seasoning must include vinegar, oil, garlic powder [small amount], celery seed, and sugar [small amount] to accomplish a sweet and sour taste.)

5. Potato Rounds

(potatoes, white)

Purchase unit: package 1, 5 or 30 pounds

Style: Potato Round

Type: Russet

Potatoes should have good flavor, good color, and be practically uniform size and symmetrical. They should be practically free of defects such as crushed units, discolored eyes, callous areas, or discolorations that affect appearance or edibility. Potatoes should have great texture with normal flavor and odor.

6. Green Beans

Purchase Unit: Frozen

Style: Cut

Size: round, number 2 (small) or flat, number 3 (medium)

Grade: U.S. Grade A (fancy), round or flat

Product should be prepared from fresh or frozen, young immature beans. Units should be practically free from defects (excessive loose seeds, stems, ragged cuts, blemishes, or serious blemishes). Beans should be very young and tender and fully fleshed for variety, and practically free from tough or stringy units and have good flavor and odor.

Watch for spotted beans and beans with large seeds or worm holes, noticeably soft or mushy beans, lacking a fleshy texture, presence of excessive unsnapped ends, loose

stem ends, tough inedible strings, uneven and ragged units, split units, and small pieces of pod.

7. Potato Salad

Potato should have good flavor, good color, and be diced in wedges or squares. Mildly seasoned. Should hold shape and not contain much liquid and not be mushy. It should be part of the vegetable requirement. Ingredients include potato, low fat salad dressing, mustard, limited sugar, and relish.

8. Corn (whole kernel, frozen)

Style: golden

Grade: U.S. Grade A (fancy)

Corn should be whole grains of uniform, bright color, and have flavor of young, fresh, sweet corn. Grains should be evenly cut, tender, and free from defects such as silks, husks, and hard grained; corn should not be discolored or have damaged kernels.

Watch for dull color in golden varieties, irregular or ragged cut kernels with cob tissue attached, leathery kernels, clusters of grain, and worm-eaten kernels.

9. Spinach (fresh or frozen)

Purchase units: 3-lb packages, 12 per case.

Style: whole, leaf chopped.

Grade: U.S. Grade B

Greens should have reasonably uniform characteristic color and be reasonably free from defects such as grit, sand, etc., or yellow or brown or other discoloration. They should be reasonably tender in appearance, and edible quality not affected by coarse or tough leaves and stems. They should have similar varietal characteristics and be of normal flavor and odor. Watch for off colors, presence of silt, sand, grit, weeds, grass, discoloration, tough or coarse stems, or leaves, and off flavors or odor.

10. Onion

Onion should have reasonably uniform characteristics, color, and be free from debris. They should be served in diced sections as a topping or ingredient.

11. Green Pepper

Peppers should have reasonably uniform characteristic color, be free from debris, and be served in diced sections as a topping.

12. Tossed Salad

Each 1 cup serving should contain combination lettuce and carrots to meet the portion requirement. See specifications for lettuce and carrots.

13. Lettuce, head (for tossed salad)  
Heads having a green color which are at least fairly firm with fresh outer leaves and free from insect injury and discolored spots and decay.
14. Carrots (for tossed salad)  
Use shredded carrots, about ½ as much as lettuce. Carrot should be smooth solid, good orange color. Washed.
15. Baked Beans  
U.S. Grade Choice beans should be used that are uniform in size and free from foreign matter. The consistency of the beans should be of a light colored syrup. The total product should contain only mild spices.

**Fruits:**

(Canned fruit should be packed with “no added sugar.” Some canned fruits on the menu may require some sugar added to hold their structure, these fruits can be packed in “light syrup.”)

1. Raisins, fresh or cooked  
Grade: U.S. Grade A.  
Raisins should have minimum varietal characteristics, good typical color, good flavor and development. Individual packs to meet ¼ cup fruit requirement (1-1/2 ounce packs).
2. Orange Juice  
Minimum serving ½ cup. 100% juice. Canned, unsweetened. Orange juice should have color typical of fresh squeezed juice and be free of browning and oxidation. Juice should be practically free of defects, show no coagulation, have no noticeable seed particles, and have a normal flavor.
3. Pear Cup (in light syrup or packed with no sugar added)  
Purchase units: #10 can, 6 cans per case  
Style: halves (peeled), slices or quarters  
Type: Bartlett  
Grade: US. Grade B (choice)  
Count: 26 or more halves  
Packing Medium: Light Syrup  
Net Weight: 106 Ounces
4. Apples (fresh, red)  
Minimum serving size is ½ cup

Apples shall be small, 2-1/2" diameter, must be firm, crisp, and well colored. Red Delicious is requested, since apples will be eaten; and should not be over ripe, should not be irregularly shaped or have tan or brown areas on the skin.

5. Red Gelatin and Mixed Fruit Cup  
Mixed fruit (peaches, pears, pineapple, grape and cherries), water, strawberry-flavored gelatin, potassium, and sorbet. Each serving must contain ¼ cup fruit or ½ cup as specified on the menu. Units of fruit should be of uniform size, free from defects, reasonable firm tender, and have normal flavor. U.S. Grade B (choice).
6. Applesauce  
Major ingredient: regular style, unsweetened, natural flavor. Medium, sweet, typical bright color with fine-grain finish. Applesauce of thin consistency, dull or pink color will not be acceptable. U.S. Grade A only.
7. Orange (fresh, minimum serving size is ½ cup)  
Heavy, firm well-colored, well-formed fruit with fine textured skins. 138 count, medium, California or Arizona or 125 size, Florida or Texas.
8. Grape Juice (minimum serving ½ cup)  
Fortified with vitamin C. 100% juice. U.S. Grade A. Juice should have a bright purple or reddish color, be free of pulp, skins, and tartrate crystals. It should have a distinct flavor.
9. Fresh Banana (minimum serving is 1 medium banana)  
150 count- 3 to 4 bananas per lb.  
Should be reasonably free from bruising.
10. Fresh Strawberries (minimum serving is ½ cup)  
May substitute frozen strawberries (sliced, packed in light syrup) when out of season or a bad crop is produced.
11. Peaches (frozen cup)  
Purchase Units: 6-1/2-10 or 30 pound can.  
Style: sliced  
Type: light syrup or no sugar added  
Grade: U.S. Grade B  
Peaches can be served from a #10 can.

Peaches should be reasonably uniform with bright color typical of reasonably well-matured fruit. They may possess a slight variation in color with not more than very light brown color resulting from oxidation. They should be reasonably uniform in size and symmetrical and reasonably free of misshapen units. They should be reasonably free from defects such as extraneous material, peel, pits and pieces of pits, damaged, or

blemished units. They should have reasonably uniform tender texture, not excessively mushy or soft, with normal flavor and odor and similar varietal characteristics.

Watch for variable color, off-color, dull color, or excessive brown oxidation, presence of misshapen units, pits, stems, peel, scab, insect injury, hard, rubbery, or soft, mushy texture, and excessively frayed units or off-flavor or odor. Federal Specification Number: Z-F-1743/11.

12. Peaches, sliced

Peaches should be purchased in #10 cans. U.S. Grade C (standard). Packed in light syrup or no sugar added. Peaches should be wholesome fruit of good flavor and fairly uniform in color. Be fairly free of defects, such as skins or discolored units. Peaches may be soft but not broken.

13. Fruit Cocktail or Mixed Fruit as Specified

Fruit cocktail should be purchased in #10 cans. U.S. Grade B (choice). Fruit cocktail should be packed in light syrup or no sugar added with all fruits having good color and be practically free from staining from the artificial dye when maraschino cherries are used. Units of each fruit should be of uniform size, free from defects, reasonably firm, tender, and have normal flavor. Fruit cocktail should contain neither less than nor more than: 30-50% peaches, 25-45 % pears, 6-16% pineapple, 6-20% grapes, 6% cherries (maraschino).

14. Pineapple (chunks)

Purchase Units: #10 cans, 6 cans per case  
 Grade: U.S. Grade B (choice)  
 Packing Medium: light syrup or no added sugar  
 Net Weight: 108 ounces  
 Drained Weight: 65.75 ounces

Pineapple should have reasonably good color. It may have slightly dull color but should be characteristic or properly matured pineapple of similar varieties. Color may vary between units and have white radiating streaks present, but such variations should not seriously affect the appearance. It should be reasonably uniform in size and reasonably free from defects (brown spots, eyes and bruises), have a reasonably uniform ripeness, and be fairly free of porosity.

There should not be more than 1.1 ounces of core per pound of drained fruit. Pineapple should have good flavor and odor. Watch for off-color, excess of light-colored units, white markings, or units excessively blemished with deep eyes, brown spots, bruises, or peel.

15. Apple Juice (minimum serving size is ½ cup)  
Fortified with vitamin C. 100% juice. Canned, U.S. Grade A (fancy). Bright typical color. Unsweetened.
16. Pineapple Juice (100% juice, minimum serving size is ½ cup) U.S. Grade A. Pineapple juice should have undiluted unfermented bright, light yellow to golden yellow color, and be practically free of defects. Juice should have a distinct flavor and no coagulation of pulp.

NOTE: All other juices must be 100% fruit juice.

17. Cinnamon Applesauce  
Major ingredients: regular style, unsweetened, natural flavor with a mild amount of cinnamon added. Medium sweet, typical bright color with fine grain finishes. Applesauce of thin consistency, dull/pink color will not be acceptable. U.S. Grade A.

**Bread and Bread Products:**

(One out of 2 grains required must be whole grain on lunch menu.)

1. Buns (hamburger) or dinner roll – Each bun/roll must weigh at least 0.9 ounces.  
Major ingredients: crust uniform in color and thickness. Texture soft, whole grain or enriched flour, shortening, water, milk or buttermilk, salt, yeast, and sugar.
2. Wheat Bread  
Labeled “enriched bread” or whole grain. One slice must weigh at least 0.9 ounce.
3. Rye Bread  
Made from rye flour. A serving (slice) must have a minimum weight of 0.9 ounce.
4. White Enriched Bread  
Made of flour, shortening, sugar, yeast, salt and water. Contains 62% total solids. Each slice must weigh at least 0.9 ounces. Enriched bread must contain thiamin, riboflavin, niacin, and iron.
5. Hoagie Bun  
Each bun must weigh at least 0.9 ounces. Made from enriched or whole grain flour, shortening, water, milk, salt, and yeast, or whole grain.
6. Pizza Crust  
Minimum serving weight requirement is 0.9 ounces. Crust will be credited to equal one serving of bread and must be a component of an approved pizza.
7. Italian Bread

Made of whole grain or enriched flour or meal. Weigh at least 0.9 ounces and contain approximately 35% moisture.

8. Buns (frankfurter) – each bun must weigh 0.9 ounces. Made from enriched or whole grain flour, shortening, water, milk, salt, and yeast.
9. Tortilla Chips  
Must be made of whole grain or enriched corn and must be the primary ingredient by weight, or it must be enriched in the preparation or processing and labeled “enriched.” Serving should be equivalent to 1.1 ounces or 35 grams. Serving size is 6 to 8 chips to the equivalent of 1.1 ounce serving.
10. Rice Krispies Bars  
Primary ingredient must be cereal. Cereal must be made with whole-grain or enriched flour. Serving size is 1 ounce.
11. Enriched Biscuits (this can be a whole wheat product)  
To equal a serving of bread, each biscuit must weigh at least 25 grams or 0.9 ounces. Major ingredients: enriched all purpose flour-chemical and physical requirements based on 14% moisture. Protein 9%, moisture 13.5%, ash 46%, pH 5.4-5/8, and falling number 175-350. Enriched flour must contain thiamin, riboflavin, niacin, and iron.
12. Raisin Bread  
Made with the primary ingredient of enriched flour (both whole wheat and white in varying amounts), shortening, sugar, yeast, salt, raisins, and water. Must contain thiamin, riboflavin, niacin and iron. One slice must weigh at least 1 ounce.
13. Banana Nut Bread  
Made with the same ingredients as #12 excluding raisins. Bananas and walnuts should be substituted. One slice must weigh at least 1 ounce.
14. Ravioli (breeding)  
Must be of enriched whole-wheat flour. One serving size must be at least 0.9 ounces and made to equal 4 to 6 squares per serving. A 2-ounce serving of additional meat must be served in a meat sauce.
15. Crackers (saltines, no added salt) 0.9 ounces or 25 grams (8 crackers)  
Ingredients: Crackers are made from enriched flour (primary ingredient), shortening, malt, reduced salt, and leavening.
16. Graham Crackers

Weigh 25 grams or at least 0.9 ounces. Made from enriched flour. Contains niacin, reduced iron, thiamin, mononitrate and riboflavin, sugar, shortening. Contain one or more of the following, partially hydrogenated soybean oil, palm oil, hydrogenated palm oil, stone ground bromate whole wheat flour, corn sugar, molasses, corn syrup, sodium bicarbonate, salt, caramel color, lecithin.

17. Enriched Oatmeal Cookies

Minimum serving requirements of 35 grams or 1.1 ounces. Whole grain or enriched flour and oatmeal of predominate ingredients as specified on the label. Provide the nutrient content equivalent to iron, thiamin, riboflavin and niacin present in the 25-gram serving of enriched bread.

18. Lightly Buttered Noodles (this can be a whole wheat product)

Optional ingredients may include seasonings such as onion, garlic, etc., gum gluten, and selected acceptable chemical compounds. Buy enriched products containing thiamin, riboflavin, niacin, and iron.

19. Muffins (banana nut, blueberry, bran, raisin)

Minimum weight per muffin is 1 ounce and must contain approximately 35% moisture. Main/primary ingredient must be made from whole-grain or enriched meal or flour.

**Other Foods:**

1. Mustard – Prepared mustard with good flavor, odor, color, and consistency. Individual packets.
2. Ketchup – Tomato ketchup. Good red, ripe, tomato color, good consistency, not runny, no separation of liquid, free of specks, seed particles, good clean, aromatic odor. Individual packets.
3. Salad Dressing – To be used instead of mayonnaise for sandwiches. Should be off-white in color. Have good texture. Emulsified semi-solid food prepared from edible vegetable oil, acid (vinegar, lemon or lime juice), whole eggs or egg yolks, food starch, and seasoning such as salt, sugar, mustard, etc. Finished product must contain not less than 30% vegetable oil and not less than 4% egg yolk. Individual packets.
4. Syrup/ Light Syrup – Blended sugar and maple syrup. Formulated from not less than 15% not more than 25% (solid base) of maple syrup or maple sugar syrup of at least 66 Brix Solids and balance of granulated sugar syrup. The finished product will not be less than 66% Brix. In individual packets.
5. Bar-B-Que Sauce – Sauce should be of a typical bar-b-que flavor, mildly seasoned, and free from foreign matter. Two tablespoons of individual packets.
6. Salt – Iodized. 1.15 gram per serving. Pepper – 1.15 gram per serving

7. Sugar – Form. White granulated sugar is made from both cane and beets. The sugar crystals range from coarse to fine. Individual packets as indicated on the menu.
8. Taco Sauce – Sauce should be of typical tomato sauce flavor, mildly seasoned and free from foreign matter. Two tablespoons or individual packets.
9. Strawberry Jelly – Individual packets must be of a pulpy consistency and prepared from clean, sound mature fresh fruit. Minimum 45% by weight of fruit ingredients to each 55% of sweetening ingredient solids.
10. Margarine – Individual patties. The flavor should be pleasing, clean, sweet and free from taint or foreign odor. Main ingredients include: corn oil, partially hydrogenated corn oil, non-fat dry milk, vitamin A and D, salt, artificial coloring, and permitted chemical substances.
11. Mayonnaise – Individual Packets. Emulsified semi-solid food prepared from edible vegetable oil, acid (vinegar), whole egg or egg yolks, and seasoning (salt, sugar, mustard, etc.). The finished product must contain not less than 65% vegetable oil.
12. Salad Dressing (low fat dressings must be offered) – (French, Italian, Ranch, 1000 Island, Catalina, Honey Mustard) Individual packets. To be served with tossed salads. Emulsified fluid food made with water, vinegar, salt, sugar, soybean oil, garlic, xanthan gum, spices, and calcium disodium to preserve flavor, natural flavor, and artificial color.
13. Gravy (ONLY low sodium gravies are allowed) – beef or chicken-based product. All products used should be of good grade. They should be prepared under sanitary conditions in accordance with the regulations of both federal and state departments of public health. The protein constituent must be derived from any one or a combination of the following: hydrolyzed plant protein, monosodium glutamate, beef, or chicken extract, beef or chicken fat, caramel coloring, and other ingredients. The product must be non-caking and must readily dissolve in hot water. When reconstituted the product must have the suitable flavor and appearance of bouillon. Products containing seasoning agents whose prominence materially affects the basic flavor of beef or not acceptable.

**Non-Food Items:**

Durable wrapped spoon, fork, and knife

Wrapped straw (optional) and standard size napkin

Paper plate for products specified on the menu: durable compartmental paper plates

## **TERMS AND DEFINITIONS**

Whenever the following words and expressions appear in the Request for Proposal document or any amendment thereto, the definition or meaning described below shall apply.

**ADA** - Americans with Disabilities Act

**Administrative Costs** - Those personnel and associated costs not directly involved with providing units of service.

**Amendment** - A written, official modification to a Request for Proposal or to a contract.

**Attachment** - Applies to all forms which are included with a Request for Proposal to incorporate any informational data, or requirements related to the performance requirements and/or specifications. Attachments are for the organization to complete and submit with the proposal prior to the specified target date and time.

**Proposal Submission Sheets** - Applies to the form(s) on which the organization must state the price(s) applicable for the services required in the Request for Proposal. The pricing pages must be completed and submitted by the organization with the proposal prior to the specified proposal target date and time.

**Proposing Organization** - The person or organization that responds to a Request for Proposal by submitting a proposal with prices to provide the services as required in the Request for Proposal document.

**Contract** - A legal and binding agreement between two or more competent parties, for consideration for the procurement services.

**Organization** - A person or organization who is a successful bidder as a result of a Request for Proposal and who enters into a contract.

**Designated Nutrition Centers** – Nutrition centers providing a congregate meal and other social activities.

**Exhibit** - Applies to forms which are included with a Request for Proposal for information purposes or for the organization to utilize.

**May** - A certain feature, component, or action is permissible, but not required.

**Means Testing** - Use of income to limit or deny service.

**Must** - A certain feature, component, or action is a mandatory condition. Failure to provide or comply will result in a bid being considered non-responsive.

**Request for Proposal (RFP)** - The solicitation document issued by Young at Heart Resources to potential organizations for the purchase of services as described in the document. The definition includes these Terms and Conditions as well as all exhibits, attachments, and amendments thereto.

**Shall** - Has the same meaning as the word must.

**Should** - A certain feature, component, and/or action that is desirable but not mandatory.

**Weekend** – That period of time from 6:00 p.m. Friday until 9:00 p.m. Sunday.

**ELIGIBILITY ASSESSMENTS**  
**Attachment B**

The standards referenced in this exhibit govern eligibility assessments and reassessments, also referred to as intakes, are supported by the Older Americans Act, and are minimum requirements for services provided through Young at Heart Resources funding.

Eligibility for services provided by Title III of the Older American’s Act is limited to those individuals 60 years of age or older or as specified in the service standards (CSR).

The organization must clearly establish its ability to provide accurate and comprehensive eligibility assessments throughout the year.

**SERVICES REQUESTED**

Eligibility assessments shall consist of gathering and inputting into the AgingIS database, at a minimum, the following data collection elements contained in the client registration section:

For Congregate Clients:

Name

Address

General demographic information

Marital status

Perceived health status

Annual income

Medicaid eligibility

Other contact information

Nutritional risk assessment screening

For Home Delivered Clients:

Name

Address

General demographic information

Marital status

Perceived health status

Annual income

Medicaid eligibility

Other contact Information

Nutritional risk screening

Activities of Daily Living screening

Instrumental Activities of Daily Living screening

Identification of a qualifying condition for home delivered

Assessments

Assessments are expected to be completed for congregate clients the first time they come to the center. Home delivered assessments are required annually.

For Congregate Clients:

To protect the integrity of the data base it is recommended that organizations review and update ALL general information including contact information in the data base annually.

For Home Delivered Clients:

Review and update ALL the general information including contact information in the AgingIS database annually:

Reassess the nutritional risk assessment in full

Reassess the activities of daily living in full

Reassess the instrumental activities of daily living in full

Review and update the qualifying conditions as needed

### **Process**

For Congregate Clients:

Initial assessments must be completed on new congregate clients the first time they come in to eat at a congregate site. It is strongly recommended that reassessments should be conducted annually on clients who receive congregate services to protect the integrity of the information.

For Home Delivered Clients:

Initial assessments must be completed in the **client's home, face to face**, prior to the beginning of service. Unless it is an emergency situation, for example, an individual comes home from the hospital and needs meals over the weekend, meals may be distributed but the assessment must be done within five days. If an emergency, it should be noted in the AgingIS program as to why the meals were distributed prior to the assessment.

Reassessments must be conducted annually for clients who continue to receive services. Although assessments must be completed annually, face to face in the client's home, depending on the client's reason for eligibility, more frequent reassessment may be necessary. An example would be a temporary eligibility such as surgery, sickness, etc., versus a long-term eligibility rating such as chronic disease, inability to get out, etc. Assessment training is mandatory.

**REPORTING AND INVOICING**  
**Attachment C**

- A. The organization shall submit reports, documents, and data using the forms and/or formats specified, provided or approved by Young at Heart Resources. All forms needing approved by Young at Heart Resources must be submitted with the Request for Proposal.
- B. The organization shall be paid monthly upon receipt and approval of all monthly and quarterly reports as well as any additional or special reports required by Young at Heart Resources based on the risk status determination. Payments will be made within 45 days unless funds are not available.
- C. Young at Heart Resources reserves the right to reallocate or reduce contract funds at any time during the contract period due to underutilization of contract funds or change in the availability of contract funds. Young at Heart Resources will provide the organization with a thirty (30) day written notice.

**D. Monthly Reports and Due Dates:**

- a. Data entry for all units must be completed no later than the close of business on the fourth (4<sup>th</sup>) day of the following month,
- b. The following reports are to be entered in AgingIS or other source identified by Young at Heart Resources by 4:00 pm on the fourth (4<sup>th</sup>) day of the following month:
  - 1. monthly invoice information sheet – properly completed and signed
  - 2. contribution sheet
  - 3. signed Medicaid documentation of services not delivered
- c. Signed invoices are due within two working days of receipt of invoice.

Failure to submit timely reports (regular and special) may result in a delay of payment or, forfeiture of payment.

**E. Other Reports:**

C3/C5 and proof of purchases, financial statements, including balance sheet, profit and loss, and budget vs actual are due quarterly. All reports must meet GAO and GAAP standards.

July – Sept                      Due by the end of October

July – Dec	Due by the end of January
July – March	Due by the end of April
July – June	Due by July 12

Contractors must submit **year-to-date financial reports** from **July through the end of the applicable quarter**, consistent with YAHR’s fiscal year. Year-to-date reporting allows YAHR to monitor spending trends, match requirement and service units and program performance. This ensures programs remain on track and helps prevent unexpected issues later in the fiscal year.

**Other Conditions:**

- a. The organization shall use the My Vault Mail secure email system, or other source identified by Young at Heart Resources, when transmitting any client and/or confidential information related to this proposal. The organization will be responsible for all associated costs at the established rate, currently \$22.25 per quarter, payable to Young at Heart Resources. In addition, the organization will be responsible for entering all required information into the secure aging program, currently AgingIS. The organization shall also be responsible for the cost of AgingIS at the established rate, currently \$285.51, payable to Young at Heart Resources.
- b. The organization is responsible for accurate and timely entry of their client data and service provision into the AgingIS program.
- c. All units will be locked by Young at Heart Resources at 4:00 pm on the fourth (4<sup>th</sup>) day of the following month in order to prepare reports and bill Medicaid in a timely fashion. If the fourth falls on a weekend, organizations will have until the following Monday at 4:00 pm. Any units not entered in AgingIS by that time will not be reimbursed, unless an exception has been received and approved in writing. As soon as you become aware—at least three (3) business days before the fourth (4<sup>th</sup>) day of the following month—that you will be unable to complete your data entry by the end of business on that day, you must contact the Young at Heart Resources executive team. Please note that failure to enter the required information accurately and on time may result in a loss of reimbursement.
- d. No payment shall be made to the organization for any services or expenditures for which the contractor has been paid or will be paid by another source whether served to eligible or ineligible persons.

- d. Organization staff time spent for fundraising or any other activity outside the scope of this contract shall not be funded by contract funds.
- f. Funds may be transferred from one nutrition service to the other during the month of April. Request for transfers shall be at a minimum of \$1000 dollars and will be approved on a case-by-case basis by the board of directors. All requests for transfers must be sent to the CEO by April 1, 2027, to be considered.

**F. Additional Expectations under the Older American's Act:**

The Older Americans Act makes it clear that nutrition education and outreach are an integral part the nutrition program under Section 331 of the act. The following sets forth Young at Heart Resources expectations.

- a. **Nutrition Education:** Each nutrition contractor is expected to provide nutrition education to all participants, both congregate and home delivered, at least quarterly, and log it into AgingIS by end of business on the fourth (4<sup>th</sup>) working day of the month following the end of each quarter.
- b. **Outreach:** Outreach, being an integral part of the nutrition program, is essential to reach those in the community who need nutrition as well as other services to remain safely in their home and community. It is expected that nutrition providers will provide outreach to their communities as one of their performance measures. The organization must log the outreach into AgingIS by end of business on the fourth (4<sup>th</sup>) working day of the following month.
- c. **Client Reassessments:** Both congregate and home-delivered meal recipients must be assessed and entered into AgingIS in accordance with the assessment training when first receiving services. Thereafter, congregate should be updated annually if possible and entered into the database. Home delivered reassessments are mandatory and must be completed by the due date for the client's continued eligibility. Home delivered eligibility assessments and reassessments must be completed face-to-face and in the home setting. Failure to properly reassess, following the assessment training guidelines, and update the information in AgingIS for home delivered clients will result in the client being considered ineligible. Any meals served to them will not be eligible for payment until the reassessment has been properly completed, entered and uploaded into AgingIS and approved by Young at

Heart Resources. Any payments lost are non-refundable. All assessment forms must be uploaded to AgingIS by the organization. Once the assessments are uploaded the forms may be shredded.

- d. **Fraud Facts:** Young at Heart Resources will send out fraud facts monthly. These must be read and disbursed to congregate and home delivered clients. The public education & information form shall be sent to Young at Heart Resources executive team for data entry into AgingIS as soon as completed or by the fourth day (4<sup>th</sup>) of the following month.

Failure to comply with the contract may result in a “high risk” determination for the organization and require the development and implementation of a corrective action plan. Continued failure to comply may result in a reduction or termination of the contract.

_____	_____
Board Chair Signature	Date
_____	_____
Center Administrator Signature	Date

**ESTIMATED ALLOTMENT TABLES**  
**Attachment D**

Contractor	CONGREGATE MEALS			HOME DELIVERED			Estimated Medicaid	TOTAL	
	OAA	USDA		OAA	USDA			Congregate InKind	Home Del Inkind
Andrew	\$34,536.00	\$5,933.00	\$40,469.00	\$53,922.00	\$9,062.00	\$62,984.00	\$34,520.84	\$8,094.59	\$9,515.85
Atchison - Rock Port	\$21,305.00	\$3,660.00	\$24,965.00	\$22,868.00	\$3,310.00	\$26,178.00	\$4,726.04	\$3,759.71	\$4,035.53
Atchison - Tarkio	\$14,299.00	\$2,456.00	\$16,755.00	\$41,118.00	\$6,690.00	\$47,808.00	\$18,539.90	\$2,523.35	\$7,256.12
Buchanan	\$30,070.00	\$5,165.00	\$35,235.00	\$48,658.00	\$8,087.00	\$56,745.00	\$249,321.96	\$5,306.47	\$8,586.71
Caldwell	\$6,338.00	\$1,088.00	\$7,426.00	\$38,657.00	\$6,234.00	\$44,891.00	\$20,973.75	\$1,118.47	\$6,821.82
Cameron	\$0.00	\$0.00	\$0.00	\$27,089.00	\$4,091.00	\$31,180.00	\$46,812.70	\$0.00	\$4,780.41
Clinton	\$24,016.00	\$4,125.00	\$28,141.00	\$39,066.00	\$6,310.00	\$45,376.00	\$19,838.16	\$4,238.12	\$6,894.00
Daviess - Gallatin	\$19,156.00	\$3,291.00	\$22,447.00	\$37,394.00	\$6,000.00	\$43,394.00	\$40,171.34	\$3,380.47	\$6,598.94
Daviess - Pattonsburg	\$12,200.00	\$2,096.00	\$14,296.00	\$18,239.00	\$2,452.00	\$20,691.00	\$7,397.28	\$2,152.94	\$3,218.65
DeKalb	\$14,021.00	\$2,408.00	\$16,429.00	\$47,433.00	\$7,860.00	\$55,293.00	\$13,001.28	\$2,474.29	\$8,370.53
Gentry	\$20,015.00	\$3,438.00	\$23,453.00	\$25,833.00	\$3,859.00	\$29,692.00	\$22,266.56	\$3,532.06	\$4,558.76
Grundy	\$26,645.00	\$4,577.00	\$31,222.00	\$46,214.00	\$7,634.00	\$53,848.00	\$59,925.44	\$4,702.06	\$8,155.41
Harrison	\$19,271.00	\$3,310.00	\$22,581.00	\$32,691.00	\$5,129.00	\$37,820.00	\$64,053.72	\$3,400.76	\$5,769.00
Holt - Maitland	\$13,029.00	\$2,238.00	\$15,267.00	\$15,582.00	\$1,960.00	\$17,542.00	\$4,090.92	\$2,299.24	\$2,749.76
Holt - Mound City	\$5,276.00	\$906.00	\$6,182.00	\$38,698.00	\$6,242.00	\$44,940.00	\$11,759.06	\$931.06	\$6,829.06
Linn - Brookfield	\$34,199.00	\$5,875.00	\$40,074.00	\$88,747.00	\$15,512.00	\$104,259.00	\$80,295.98	\$6,035.12	\$15,661.24
Linn - Marceline	\$27,828.00	\$4,780.00	\$32,608.00	\$33,727.00	\$5,321.00	\$39,048.00	\$43,197.50	\$4,910.82	\$5,951.82
Livingston	\$39,573.00	\$6,798.00	\$46,371.00	\$60,510.00	\$10,282.00	\$70,792.00	\$82,659.00	\$6,983.47	\$10,678.24
Mercer	\$26,142.00	\$4,491.00	\$30,634.00	\$34,538.00	\$5,471.00	\$40,009.00	\$39,648.30	\$4,613.29	\$6,094.94
Nodaway - Maitland	\$0.00	\$0.00	\$0.00	\$21,194.00	\$2,999.00	\$24,193.00	\$9,694.92	\$0.00	\$3,740.12
Nodaway - Other	\$0.00	\$0.00	\$0.00	\$24,344.00	\$3,583.00	\$27,926.00	\$79,101.00	\$0.00	\$4,296.00
Putnam	\$33,786.00	\$5,804.00	\$39,590.00	\$57,964.00	\$9,810.00	\$67,774.00	\$42,366.24	\$5,962.24	\$10,228.94
Sullivan	\$13,574.00	\$2,332.00	\$15,906.00	\$25,154.00	\$3,733.00	\$28,887.00	\$29,888.00	\$2,395.41	\$4,438.94
Worth	\$0.00	\$0.00	\$0.00	\$9,487.00	\$831.00	\$10,318.00	\$10,087.20	\$0.00	\$1,674.18
<b>TOTAL</b>	<b>\$435,279.00</b>	<b>\$74,771.00</b>	<b>\$510,051.00</b>	<b>\$889,127.00</b>	<b>\$142,462.00</b>	<b>\$1,031,588.00</b>	<b>\$1,033,336.89</b>	<b>\$80,344.06</b>	