



# **Partner Policy & Procedure Handbook**

Updated October 2017

## TABLE OF CONTENTS

Quick Reference Guide	3
Introduction	4
Our History	4
Our Food Sources	5
Partner Qualifications	6
Partner Benefits	7
Procedures	8
Communications	8
Partner Agreement	8
Partner Handbook	8
Pre-Operational & Annual Site Visits	9
Product Allocation	10
Warehouse Procurement	10
Mobile Markets	12
Co-Op Orders	12
Order Errors	13
Payment Guidelines	13
Reporting	15
Quarterly Reports	15
On-Site Records	15
Invoices	15
Food Bank –Enabled Programs	15
Surveys	16
Program Requirements	17
Patron Qualifications	17
Product Handling and Storage	17
Service Operations	19
Inappropriate Use of Food Bank-sourced food	19
Voluntary Contributions	19
Violations	20
Minor Violations	20
Major Violations	20
Appendix	22
Warehouse Rules	23
Temperature Chart	24
Quarterly Report	25
Qualifying Incomes Guidelines	26
Example of Food Assistance Sign-In Sheet	27

## QUICK REFERENCE GUIDE

### Ordering Procedures

	Warehouse Pick-Up	Mobile Markets	Co-Op Orders
<b>Availability</b>	M-F 8am-3pm	Monday 9-11am	M-F 8am-3pm
<b>Appt Length</b>	30 minutes	30 minutes	N/A
<b>Menu Sent</b>	2 days before appt	12 noon Thursday	By request
<b>Order Deadline</b>	12 noon day before appointment	3pm Friday	3 days before pick-up or delivery
<b>Pick-Up Location</b>	<i>SLO Food Bank</i> 1180 Kendall Rd. San Luis Obispo	<i>Grace Baptist Church</i> 535 Creston Rd. Paso Robles  <i>New Life Church</i> 990 James Way Pismo Beach	Under \$500: <i>SLO Food Bank</i> 1180 Kendall Rd. San Luis Obispo  Over \$500: Free Delivery
<b>Email</b>	agencyorders@slofoodbank.org		co-oporders@slofoodbank.org

### Food Bank Contacts

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Please send all significant correspondences (changes in services, operations, personnel, etc.) to **partnerservices@slofoodbank.org**.

## INTRODUCTION

The Food Bank Coalition is the only countywide source of nutritious food for people in need from San Miguel to Nipomo. We work hand in hand with volunteers, donors, corporate sponsors and non-profit Partners to see that no one in San Luis Obispo County experiences food insecurity, malnutrition, or hunger due to poor access to healthy and nutritious food.

**Mission Statement:** The mission of the Food Bank Coalition is to work with a network of community Partners to alleviate hunger in San Luis Obispo County and build a healthier community.

**Vision Statement:** The Vision of the Food Bank Coalition of San Luis Obispo County is that every person in the county has adequate access to nutritious food.

1. Every human being has the right to nutritious food, regardless of the reasons that they may not be able to obtain it for themselves.
2. The Food Bank's intent is not only to help make nutritious food available through our programs and agencies, but also to encourage and support each person we serve, recognizing their possible vulnerabilities and sensitivities.
3. Everyone the Food Bank serves, whether individuals, families, or agencies, deserves to be treated with kindness, respect, and dignity.
4. It is our privilege to serve without judgment.

## Our History

The Food Bank Coalition was founded in 1989 by a group of community members from churches and other non-profits that wanted a better and more coordinated way to address the hunger needs of the county. During its first year of operation, the Food Bank distributed 400,000 pounds of food through its 20 non-profit Partners. Today, over 5 million pounds of food pass in and out of our doors each year, 48% of which is fresh produce. We work with more than 100 non-profit agencies including homeless shelters, food pantries, senior centers, and religious institutions to help us reach the needy populations in our county. We also have several direct distribution programs including Neighborhood Food Distributions, Children's and Seniors' Farmers Markets, No-Cook Bags, Brilliant Beginnings Summer Breakfast Bags, and Summer Food Service Program.

The Food Bank works hard to make sure that we are able to meet the needs of our community as efficiently as possible. We rely on our extensive volunteer base, which numbers over 4,000 strong. These are the people that help us pack produce bags, run public distribution sites, and assist in administrative work. Our invaluable staff members work tirelessly to keep things running smoothly and in accordance with the best practices as outlined by Feeding America guidelines.

## **Our Food Sources**

The Food Bank relies on several different sources to make sure that we are able to supply our Partners with a variety of nutritious foods.

### *Networks*

The Food Bank participates in two wide-reaching networks: Feeding America and the California Association of Food Banks. These two networks allow us to order produce and dry goods cooperatively with other Food Banks and to exchange any excess food items we may have for other products or produce that may be in short supply.

### *GleanSLO*

A Food Bank-enabled program that works with local farms and homeowners to gather excess produce from their fields, trees, and home gardens for redistribution through our Partners and direct distribution programs. This same team also collects leftover produce from SLO County Farmer's Markets. The produce gleaned through this program affords us the opportunity to share locally-grown produce with our community.

### *Grocery Rescue*

We partner with numerous grocery stores in the area to rescue produce, meats, ready-to-eat meals, and packaged goods. Partners may be eligible to participate directly in these grocery rescues based on program size, needs, and reporting capabilities.

### *Food Drives*

The majority of our shelf-stable foods come from food drives organized by the Food Bank or third-party organizations. Stamp Out Hunger, Hope for the Holidays, Food for Fines, Season of Hope, and other food drives run by schools and local businesses allow us to maintain a consistent supply of staple items.

### *Government Support*

The Food Bank administers various State and Federal food assistance programs. In some cases, the food from these federal assistance programs is made available for distribution through our Partners.

### *Bulk Purchasing*

Using funds from private donations and public grants, the Food Bank purchases staple food items in bulk. Partners are able to source these items for their own program at a cost far lower than retail pricing.

The Food Bank strives to have a large quantity and variety of food items available to Partners. Despite these efforts, we cannot guarantee the availability of certain foods. Changes in demand, donation patterns, and seasonal supply all affect the day-to-day variety of food options for Partners. Because of this, we ask all Partners to be aware of these limitations and to have other avenues of food procurement available to supplement their stores as needed.

## **PARTNER QUALIFICATIONS**

The Food Bank strives to serve every family and person regardless of their circumstances or background. In order to do this, we must ensure that the community organizations that we partner with have compatible programs and services. In addition, the Food Bank must remain in compliance with USDA and Feeding America guidelines. By adhering to the guidelines of these overseeing organizations, we maintain access to numerous resources that we are then able to pass on to our Partners and, in turn, better serve our community.

In order to maintain the integrity and sustainability of our community Partnerships, we require that all organizations meet the following qualifications before becoming a Partner:

1. Provide service to low-income individuals
2. Maintain tax-exempt status under Section 501(c)(3) of the Internal Revenue Code of 1986
3. Operate a program that incorporates food as part of its normal scope of services
4. Maintain regularly scheduled hours or outreach calendar
5. Understand that the Food Bank is not able to guarantee supply of some food items
6. Maintain service location(s) within San Luis Obispo county boundaries
7. Maintain an active California ServSafe® Food Handler's Card
8. Agree to annual or as-needed site visits
9. Agree to regularly track and report client participation on a quarterly basis

After your organization's eligibility for Partnership has been confirmed, you will be asked to submit the following paperwork to *partnerservices@slofoodbank.org*:

- Signed & complete *Application for Partnership*
- A determination letter from the IRS confirming 501(c)(3) status
- A copy of the California ServSafe® Food Handler's Card

A Food Bank staff member will then contact you regarding your application and set up a Pre-Operational Visit. This visit will involve a review of your program operations, food storage and handling procedures, and to learn more about your organization's positive impacts on the community. To prepare for the Pre-Operational Visit, please review "Pre-Operational & Annual Site Visits" on page 10 and "Program Requirements" on page 18.

Once a nonprofit organization has been approved and completed the Pre-Operational Visit, they may gain access to the benefits that come along with being a Partner with the Food Bank.

## **PARTNER BENEFITS**

The Food Bank strives to not only provide food, but also to serve as a resource to our community Partners. Here are some of the numerous benefits that we currently offer to all of our Partners:

- Access to free and shared-cost nutritious foods through the Food Bank warehouse
- Bulk and highly discounted staples and specialty items via Co-op Orders
- Access to regional Mobile Markets
- Use of the conference room at the Food Bank
- Eligibility for grant-supported opportunities, including equipment, infrastructure, and food rescue programs
- Recurring direct grocery rescue opportunities for eligible Partners
- Joint-fundraising opportunities multiple times per year
- Volunteer opportunities to earn money towards your Food Bank account
- Quarterly meetings to share information about Food Bank activities, industry and community news, and build relations with other local nonprofits

In order to maintain access to these benefits, Partners must remain in good standing with the Food Bank. Please see **VIOLATIONS** on page 20 for more information.

## **PROCEDURES**

The Food Bank strives to provide food to all San Luis Obispo County residents that require additional assistance obtaining healthy and nutritious food. Our Partners are essential collaborators to achieve this goal. To offer the best service and provide clear expectations to all of our Partners, we have a number of different procedures to facilitate wide-reaching and equitable distribution of food throughout the county.

### **Communication**

All official communications, including changes to personnel, service hours, and general operations, must be done through official channels. These communications must be done through one of three ways:

- Official letterhead sent by mail to the below address:  
**ATTN: Partner Services**  
**Food Bank Coalition of SLO County**  
**1180 Kendall Rd.**  
**San Luis Obispo, CA 93401**
- Fax on official letterhead sent to **(805) 238-6956**
- Email sent to the official Partner Services email **partnerservices@slofoodbank.org**

In addition, quarterly reports and ServSafe® cards may also be sent via mail, fax, or email through the channels listed above.

### **Partner Agreement**

Every Partner is required to have a Partner Agreement on file. The agreement outlines the general responsibilities of both the Food Bank and the Partner as agreed upon by the initiation of this relationship.

The agreement must be signed by the current director of the overseeing organization. In the case of leadership change, it is the responsibility of the organization to have the new director sign the Partner Agreement. In the case that the Partner Agreement is updated, the Food Bank will be responsible for notifying all Partners of this change. The Partner should have the organization's director sign the new agreement and return it to the Food Bank within a reasonable amount of time.

### **Partner Policy Handbook**

Similar to the Partner Agreement, every Partner must have a signed and dated Receipt of Partner Policy Handbook on file with the Food Bank. As the handbook is updated, Partners may be required to sign a new Receipt to ensure that every Partner is up to date on the latest requirements and procedures.

Every Partner must maintain the handbook onsite for reference and clarification regarding program operations and policies

### **Pre-Operational & Annual Site Visits**

One of the last requirements that an organization must complete before becoming a Partner is the Pre-Operational Visit. During the Pre-Op Visit, a Food Bank staff member will be reviewing the program(s), general operations of the facility, and food handling and safety procedures.

After becoming a Partner, each organization will undergo an Annual Site Visit to ensure that each program stays within compliance and is doing its best to meet the needs of its local community. A Partner may be subjected to more frequent and/or unannounced Site Visits if numerous or serious operational or safety concerns have been identified, as determined by the Partner Services Coordinator.

Below is a list that will be reviewed by the Food Bank staff during a visit:

#### *Program Information*

- Style of program(s) held on site
  - **Congregate Meal Program** – The Partner prepares and serves meals to nonresidential patrons on or off site.
  - **Emergency Food Provider** – The Partner provides food assistance, including produce, packaged goods, and bakery items, to walk-in patrons in need of one-time or short-term food assistance. This includes food pantries and direct grocery delivery programs.
  - **Residential Program** – The Partner prepares and serves meals to patrons that live in a Partner-run residential facility.
- Populations supported by the Partner
- Hours of operation
- Delivery options
- Funding information
- Current source(s) of food
- Steps taken to ensure distribution of food to all patrons without regard for their race, religion, or sexual orientation, or their participation in religious services or classes
- Presence of a Spanish interpreter
- Determination of patron eligibility
- Requirements and qualifications for service
- Process used to determine eligibility for service
- Method used for tracking number and age of patrons (required for Quarterly Reports)

#### *Food Safety*

- Verification of Food Handler's card and related certifications
- Handwashing station with hot water, one-use towels, and soap
- Presence of a hand washing informational poster in the restroom
- Storage of nonperishable foods at least 6 inches off the floor
- Labeling of nonperishable foods with date of entry
- Stock rotation procedures

- Appropriate storage and labeling of toxic items and cleaning products
- Cleanliness of refrigerators and freezers
- Proper cold storage of food items (e.g. raw meats below prepared foods)
- Labeling of perishable foods with expiration date
- Measurement and tracking of cold storage temperatures using a thermometer and temperature logs (see *Temperature Log* in **Appendix**)
- Use of appropriate storage shelves and cabinets for dry storage
- Cleanliness and sanitation of our food storage and preparation surfaces
- Transportation of all cold food items in coolers with ice/cold packs or with an ice blanket

#### *Facility Review*

- General cleanliness of surfaces, walls, and floors
- Pest control methods
- Sufficient lighting and visibility
- Trash disposal methods
- Cleanliness and repair of the restroom
- A three-compartment sink (congregate meal programs only)

#### **Product Allocation**

The Food Bank does its best to distribute both food and nonfood items to its Partners in a fair and equitable fashion. Because of this, Partners serving more patrons may receive priority for items that are in limited supply.

Below is a list of items available and the shared cost of those items per pound (as of 10/1/17):

- **Dairy** (free) – milk, yogurt, sour cream, butter, margarine, and cheeses
- **Bread & pastries** (free) – fresh bread, cookies, and baked goods
- **Produce** (free) – all fresh fruit and vegetables
- **Meat & seafood** (\$0.18/lb) – meat, poultry, seafood, and deli meats
- **Food rescue items** (\$0.18/lb) – frozen foods, canned goods, dry goods, etc.
- **Non-food rescue items** (\$0.18/lb) – diapers, pet products, personal care products, cleaning supplies, paper goods, etc.

Currently, there are three ways that a Partner may procure Food Bank items: warehouse appointment, mobile markets, and co-op orders.

#### **Warehouse Appointment**

The warehouse is the main hub of all Food Bank activities, including food procurement. Partners are able to schedule an appointment to pick-up meats, canned staples, soups, pasta, and fresh produce, including the Glean of the Day from our GleanSLO program. Partners also may have the option to sort through dairy products, breads, ready-to-eat meals, self-care products, and other grocery rescue items.

A Partner will set up an appointment with the Partner Services Clerk to pick-up an order directly from the Food Bank warehouse in San Luis Obispo. Pick-ups from the warehouse are by appointment only. All appointments are made between 9:00am and 3:00pm Monday through Friday and last 30 minutes. This appointment may be recurring for each week. The Partner Services Clerk requires **24 hour notice** if an organization must make a new warehouse appointment or change their existing one.

In the case that the Partner is over 10 minutes late for their appointment, they may be not permitted to complete their pick-up at the discretion of Food Bank staff.

Partners must be aware of and abide by all warehouse rules and directions provided by Food Bank staff. For a full list of warehouse rules, please see the **Appendix**.

### *Ordering*

Two days before the appointment, the Partner will receive a Food Order Form with the weekly offerings from the Food Bank. Once the Partner has determined their order, the completed form should be sent to the following email:

**agencyorders@slofoodbank.org**

All orders must be received by **noon the business day before the appointment**. Due to changes in season, demand, and product availability, the Food Order Form does change each week, and it is important that Partners use that week's form when ordering.

In the case that the Partner does not submit an order by the deadline for their appointment, they may be permitted to sort through the food rescue, non-food rescue items, and dairy at the discretion of the Partner Services Clerk. Otherwise, the Partner will have to reschedule their appointment for a later date.

In addition to this order, the Partner will be allowed to sort through dairy and grocery rescue items that are available that day.

### *Authorized Shoppers*

Each Partner will be asked to designate representatives that they authorize to pick-up and select food for their organization called Authorized Shoppers. The Food Bank maintains a list of Authorized Shoppers for each organization. To ensure the integrity of the program and the safety of Food Bank staff and volunteers, only these Authorized Shoppers are permitted in the warehouse during their appointment time.

To ensure that those that enter the warehouse are designated representatives for each Partner, the Food Bank maintains an Authorized Shoppers list for each organization. If an individual arrives for an appointment and is not considered an Authorized Shopper, they may not be permitted to pick-up or shop for the Partner.

### *Pick-Up*

At the time of the appointment, the Authorized Shopper will park their vehicle on the Western side of the Food Bank warehouse in front of the bay door with the sign that reads “Agency Pick-Up.” After parking, please knock on the western door and the Partner Services Clerk will permit the Authorized Shopper(s) to enter and proceed with their appointment. During the first visit, the Partner will receive an orientation of the warehouse and the basic procedures and safety protocols that will be followed when picking up orders.

Each Partner must bring their own boxes, coolers, and other containers to transport their procured items back to their organization’s site while following the appropriate food safety practices. In the case that the Partner borrows any crates, banana boxes, or other containers from the Food Bank, these items must be returned to the warehouse within the week.

### **Mobile Markets**

Another option for food procurement is through the mobile markets. The objective of these mobile markets is to provide a more convenient location for Partners that are unable to travel to the warehouse. The food options at the mobile markets are often similar to the items available through warehouse appointments. The mobile markets occur **every Monday from 9:00am to 11:00am** excluding holidays. There are two markets that occur each week throughout the county:

#### **Grace Baptist Church**

535 Creston Rd.  
Paso Robles, CA

#### **New Life Community Church**

990 James Way  
Pismo Beach, CA

### *Ordering*

To place an order for a pick-up at a mobile market, a Partner will complete a survey sent out by the Partner Services Clerk by 12:00 noon the Thursday before the scheduled mobile market. The organization must complete and submit the survey by **3:00pm Friday**. If the survey is submitted late, the Food Bank may not be able to process the order in time for the Monday mobile markets.

### *Pick-Up*

To pick up an order from a mobile market, an Authorized Shopper will travel to either the north or south county location. After arrival, check in with the Food Bank staff member on location to receive your pre-ordered items. In addition, the Authorized Shopper will be permitted to sort through other Food Bank items, including grocery rescue and donations.

### **Co-Op Orders**

A third option for food procurement is through co-op orders. Co-op orders give Partners the option to purchase staple commodities at bulk discount pricing through the Food Bank. While the items available for order do change, co-op orders give Partners access to a consistent supply of staples, including meats, rice, beans, and preserved fruits and vegetables.

### *Ordering*

To place a co-op order, a Partner must request a menu from the Food Bank by emailing **co-oporders@slofoodbank.org**. The Partner will then be sent a listing of the current menu to review and order. After filling out the menu, the Partner will email back the completed menu. Please allow up to 3 business days between order receipt and fulfillment.

#### *Pick-Up*

A Partner may retrieve their co-op order from the Food Bank warehouse during their regular warehouse appointment. In the case that a Partner chooses to place a co-op order without a pre-existing warehouse appointment, they must schedule one with the Partner Services Clerk in order to pick-up the co-op order.

#### *Delivery*

Co-op orders are also available for delivery Monday through Friday between 8:00am and 4:00pm. This option is only available for orders over \$500. If a Partner chooses to have the co-op order delivered, it is the organization's responsibility to promptly unload the delivery from the Food Bank vehicle at their location.

#### **Order Errors**

If there is any issue with your order, please contact the Food Bank within 24 hours of picking up or receiving your order. It is the responsibility of the Partner or Authorized Shopper to verify that the order being received is complete and correct compared to the corresponding invoice. If a Partner received damaged or incorrect food items, these items must be returned to the Food Bank in order to receive a refund or exchange.

#### **Payment Guidelines**

In order to maintain access to Food Bank resources, each Partner must remain in good financial standing.

All new Partners must submit an initial payment to establish a credit on their account. Once the credit has been established, then the Partner is able to begin purchasing through the Food Bank's three options. Each Partner must maintain a positive account balance with the Food Bank to ensure consistent access to all Food Bank resources and food items.

If the Partner has remained in good standing with the Food Bank for 1 year, the Food Bank may extend a line of credit to that organization. The amount of that credit extended to the Partner will be determined by the length of relationship, financial standing, and community impact of the organization.

#### *Billing*

For Partners on credit, an invoice will be sent to the email on file at the beginning of the month. The Partner will have 30 days from receipt of the invoice to pay their balance with the Food Bank.

### *Payment Options*

Payment may be either mailed directly to the Food Bank or dropped off to the front desk when a Partner is picking up their order.

A Partner may pay the Food Bank in one of 3 ways:

- Organization check
- Money order
- Cashier's check

The Food Bank is unable to accept cash or personal checks.

Another option for Partners is to have dedicated donations made to the Food Bank in the name of the Partner. To maintain the integrity of the program, the donation may not come from an Authorized Shopper.

### *Returned Check Policy*

In the case that a check is returned for insufficient funds, the Food Bank will notify the organization to rectify the issue. If a second check is returned at any point, then the Food Bank will only accept Money Order or Cashier's check for that and all future payments. If payment continues to be an issue, the Partner may be put on Hold until a permanent solution is found.

### *Earned Credit Opportunities*

The Food Bank offers our Partners several ways to earn money toward their Food Bank budget:

- **Joint-Fundraising Opportunities:** The Food Bank holds numerous events each year to raise funds for our outreach and food distribution programs. Our Partners are encouraged to help raise money for the Food Bank through these events. At each event, 50% of the funds raised with the assistance of the Partner organization's staff and volunteers will be applied as a credit on their account. Partners will be notified of these opportunities through the Food Bank's Partner Services Newsletter.
- **Warehouse Volunteering:** Partners are able to earn credit to their Food Bank account by volunteering at the Food Bank warehouse. For each volunteer hour, a Partner may earn \$5 to their account. To volunteer, please reach out to our Volunteer Coordinator at [volunteer@slofoodbank.org](mailto:volunteer@slofoodbank.org).
- **Survey Participation:** The Food Bank will occasionally send out surveys and polls to determine how we are serving our community and how we can improve. To encourage participation, Partners can often earn a small amount of credit toward their Food Bank budget.

## **REPORTING**

Record keeping is an essential task for any nonprofit. Maintaining accurate records can show the measurable impacts of a program, allowing that program to apply for grants, attract donors, and remain in compliance with any overseeing organizations. The Food Bank Coalition is a Feeding America Partner Redistribution Organization (RDO) and, therefore, subject to the compliance guidelines of Feeding America. As an RDO, the Food Bank and its Partners must maintain participation records to remain in good standing with Feeding America and maintain access to resources that benefit the Partners and patrons we serve.

### **Quarterly Reports**

Every Partner is required to submit a Quarterly Report. This report outlines the number of participating households and individuals served by a Partner, as well as the general ages of those being served. Neither the Food Bank nor Feeding America requires any form of patron identification.

A Quarterly Report covers 3 months of service and is due on the 15<sup>th</sup> after the completion of that quarter. A blank Quarterly Report may be found in the **Appendix**. Below are the months of coverage and due dates for each Quarterly Report:

**Quarter 1** – January, February, and March – due April 15<sup>th</sup>

**Quarter 2** – April, May, June – due July 15<sup>th</sup>

**Quarter 3** – July, August, September – due October 15<sup>th</sup>

**Quarter 4** – October, November, and December – due January 15<sup>th</sup>

If a Partner does not turn in a Quarterly Report by its respective due date, that Partner may be placed on hold and lose access to Food Bank resources, including food procurement.

The Quarterly Report may be submitted via fax, email, mail, or in person at our front desk.

### **On-Site Records**

In addition to Quarterly Reports, each Partner is required to maintain records of their program participation for 2 years. There is no specific required form for these internal records, though the information kept should be sufficient to fulfill the requirements of the Quarterly Reports. The Food Bank recommends that each Partner establish a method of tracking that is most appropriate for their program(s). Example internal records sheets may be found in the **Appendix**.

### **Invoices**

Partners must maintain all Food Bank invoices for 2 years.

### **Food Bank-Enabled Programs**

In these cases, the Partner must maintain records of participation for these other Food Bank supported programs. These programs include No-Cook Bags, Neighborhood Food Distributions,

and Summer Food Service Program. Each program has different requirements which should be verified with the appropriate Food Bank program manager.

### **Surveys**

Partners will be asked to participate in periodic surveys. These surveys are used to gather general information regarding organization structure, program operations, outreach strategies, and usage of Food Bank resources. The results of these surveys are used to improve the offerings of the Food Bank and identify new ways the Food Bank can serve the San Luis Obispo County community.

## **PROGRAM REQUIREMENTS**

All Partner programs supplied with Food Bank resources and food must be run in accordance with Food Bank guidelines to ensure fair, equal, and safe distribution of food throughout the county.

### **Patron Qualifications**

All patrons of any Food Bank-supported program or Partner should be welcomed and treated with respect and dignity. The goal of all volunteers and staff working these programs is to welcome and encourage patron participation.

To qualify for service, the only requirement from the Food Bank is that the patron can self-certify that they qualify according to the income guidelines set by the California State Department of Social Services. The guidelines as of April 2017 may be seen in the **Appendix**.

An organization may have additional requirements for patron qualification or participation tracking as long as these requirements are non-discriminatory.

Organizations may not charge patrons for Food Bank-sourced food and resources. Residential programs are permitted to charge patrons for room, board, and other associated residential costs.

### **Product Handling & Storage**

Partners are responsible for ensuring that all Food Bank products are transported and stored in a way that follows best food safety practices. Below are the regulations and requirements for

#### *General Requirements*

- All surfaces should be clean and dry, including walls, floors, ceilings, and countertops
- Steps must be taken to control pests, including no gaps in walls, floors, or windows, and a regular inspection and/or spraying schedule
- The Partner is responsible for ensuring that Food Bank items are only used for approved program purposes
- The food storage area must be secured or locked to prevent inappropriate use or theft of Food Bank product
- All food storage areas must be clean, dry, and well ventilated
- Food Bank-sourced may not be stored or prepared at a private residence
- All transportation of refrigerated or frozen foods must be done in a way that maintains the integrity and safety of the products – the Partner is responsible for all coolers, ice packs, and freezer blankets necessary to accomplish this
- All non-food items, including cleaning products, must be stored separately from and/or below food items:
  - Chemicals and cleaning products may never be stored above or on the same shelf as food items
  - Any toxic items must be stored completely separate from all food items
- It is also suggested that Partners use the following best practices:

- A “first in, first out” policy to ensure regular turnover of foods
- Have all shelving 18” away from walls to deter pests

#### *Cooking Facilities*

- All food prep surfaces, including sinks, counters, and stovetops, should be kept cleaned and free of any non-food-related items
- Proper cleaning and sanitizing protocols should be followed before and after every meal service
- Foods that are served alongside Food Bank-sourced food, such as a congregate meal, may be prepared in private residences
- Congregate meal programs must have a three compartment sink or a dishwasher on site
  - If neither of these are present, the program must use disposable plates, bowls, and utensils

#### *Dry Storage*

- All food products must be stored off the floor in specific designated location, such as cabinets, shelving, or pallets
- The recommended temperature range for dry storage is 50°F to 70°F
- All cabinets and shelving must be made of a material that is easily cleaned and sanitized
- All surfaces should be clean, dry, and free of clutter
- Non-food items must be segregated from food items
- Food products must not be stored near or next to any heaters or heating elements

#### *Refrigerated Storage*

- All food items that require refrigeration must be stored appropriately to prevent premature spoilage of the product
- The temperature range for refrigeration storage is 35°F to 45°F
- Temperatures must be recorded on an appropriate temperature log – an example temperature log can be found in the **Appendix**
- All refrigerators must be clean and in working order
- Specific refrigerators should be dedicated to Food Bank-sourced food only
  - If this is not possible, a section of the refrigerator should be designated for Food Bank-sourced only

#### *Frozen Storage*

- All frozen food items must be stored appropriately to prevent thawing and premature spoilage of the product
- The temperature range for freezer storage is -10°F to 0°F
- Temperatures must be recorded on an appropriate temperature log – an example temperature log can be found in the **Appendix**
- All freezers must be clean, in working order, and have minimal frost/ice build-up

### **Service Operations**

A Partner must hold a program on a set schedule with regular, advertised hours. The Food Bank must be made aware of these hours to ensure proper monitoring. This is true for both open sites that accept outside referrals and closed sites only open to specific group.

Outreach programs are emergency food providers that primarily do home-deliveries. These programs must have clear guidelines as to what patrons qualify for home delivery. Outreach programs must have a regular delivery schedule and be available for proper monitoring.

### **Inappropriate Use of Food Bank Resources**

Food Bank-sourced and related items may only be used to serve eligible patrons. Using Food Bank resources in an unauthorized manner may result in suspension or termination of Food Bank shopping privileges.

Food Bank-sourced food may not be used for any fundraising events for consumption by non-eligible individuals or families. This includes charity dinners, bake sales, cook-offs, and potlucks. Nor may any Food Bank products be used as prizes for any contests or charity events.

Food Bank-sourced food may not be used for any religious functions regardless of patron qualification. This includes but is not limited to church dinners, Sunday school classes, bible studies, and Hebrew school classes. This is to ensure that patrons feel comfortable gaining assistance regardless of their religious views or affiliations. In addition, Partners are not permitted to distribute information or advertise any religious events, encourage religious organization memberships, or promote religious service attendance during any program affiliated with the Food Bank or its programs.

Food Bank product may not be consumed or used by the Partner's program staff except under the following circumstances:

1. Program staff in group home, shelter, soup kitchen, or other on-site programs may consume Food Bank product after patron meals and/or snacks are served. Priority must always go to the patrons of the program.
2. Program staff that meets the financial qualifications may participate in congregate meals and/or receive emergency food assistance. This circumstance must be documented in Food Bank and Partner records like any other distribution.

### **Voluntary Contributions**

A Partner may not charge or accept any donations to cover any operating or food expenses associated with their program. Any organization found to be asking patrons for tips, suggested donations, or other monetary contributions will be immediately terminated as a Partner.

A Partner may accept direct donations from patrons if those donations are not intended as compensation for services rendered.

## **VIOLATIONS**

The described policies and regulations in place are intended to maintain the safety, equitability, and integrity of food distributions through our Partners. These guidelines are best practices according to Feeding America and must be followed to remain in good standing with the Food Bank as a Partner. In the case that a Partner is deemed in violation of one of the site requirements, specific steps may be taken that could impact the Partner's access to Food Bank resources.

### **Minor Violations**

Minor violations are usually procedural issues that may affect the long-term success of the Partner program, but do not cause immediate food safety or fair service delivery concerns. Some examples of a minor violation include absence of a handwashing procedure sign, lack of cold storage temperature records, or distribution of religious pamphlets.

In these cases, the violation is addressed through the following steps:

1. Identification and evaluation of the issue.
2. Issuance of a written statement explaining the issue(s) and the necessary corrective action(s).
3. Schedule of a follow-up visit and/or evaluation within 6 months to determine if violation has been corrected in a timely manner and to a suitable standard
4. If the violation has not been corrected, then the Partner will be given a written warning
5. An unannounced follow-up visit within 6 months will be made to the site to determine if the violation has been adequately addressed
6. If the violation has still not been addressed, the Partner's account will be placed on suspension and they will no longer have access to Food Bank resources
7. To be removed from suspension, the Partner must set up a site visit for reinstatement
8. If the Partner remains on hold for 6 months, they will be made inactive. The organization must reapply as a new Partner if they wish to regain access to Food Bank resources.

### **Major Violations**

Any violations that immediately impact the safety or rights of any Patrons, constitute a gross misuse of Food Bank resources, or a loss of organization qualification may result in immediate suspension of Partner status.

Below are some examples of major violations:

- Exchange of Food Bank-sourced food for money, goods, or services
- Use of Food Bank-sourced food for reasons other than distribution to eligible patrons
- Blatant disregard for adequate safe food handling procedures
- Repeated delinquency in payments
- Failure to distribute Food Bank-sourced food to eligible patrons
- Termination of 501(c)(3) tax-exempt status
- Expiration of ServSafe® Food Handlers Card
- A violation of any federal, state, or local statute, ordinance, code, or regulation

- Nonexistent or grossly inadequate record keeping
- Failure to submit Quarterly Report
- Any discrimination of service delivery based on age, disability, gender, race, religion, political affiliation, or sexual orientation

In the case of a major violation, the below steps will be followed:

1. A written notification of the immediate suspension, with an explanation of the violation and the step(s) necessary to regain good standing.
2. A re-evaluation of the organization to determine if the violation has been sufficiently addressed. If so, the organization may be reinstated.
3. If the re-evaluation of the organization determines that the violation has not be sufficiently addressed, the organization must provide a written corrective action plan to the Food Bank outlining how it will regain good standing and maintain compliance going forward.
4. A second re-evaluation of the organization to determine if the violation has been sufficiently addressed. If so, the organization may be reinstated.
5. If after 6 months from the re-evaluation the organization is still out of compliance, the Partnership with the organization will be terminated. The organization must reapply as a new Partner if they wish to regain access to Food Bank resources.



# **Appendix**



## **Warehouse Rules**

1. Authorized shoppers are the only individuals allowed to pick-up orders from the warehouse. Any non-authorized individuals may be asked to leave. To add a new authorized shopper, an official correspondence by email or on letterhead must be received by the Food Bank prior to allowance into the warehouse.
2. Only two authorized shoppers per Partner are permitted in the warehouse. One assistant is permitted for shoppers that may require additional support.
3. Each Partner is only permitted in the warehouse during their 30 minute appointment time. This 30 minute appointment includes the time required for check-out and self-loading.
4. Partners are not permitted to self-select their order on site. Partners order from the Food Menu before their appointment and Food Bank staff will prepare the order for pick-up. Self-curation of Food Bank inventory is never allowed for reasons of safety and program integrity.
5. Partners are permitted to self-select bread, dairy, prepared foods, meat, non-food shelf-stable rescue, and shelf-stable rescue depending on availability.
6. Partners are only permitted in the designated Partner Services area of the warehouse.
7. All products must be weighed in either a box or bag by its specific category during check-out.
8. Partners are responsible for loading their own vehicles.
9. Anyone in the warehouse is required to wear closed-toe shoes at all times.
10. No outside food or drink is permitted inside the warehouse except water.
11. Children under 16 years of age are not permitted in the warehouse during the appointment.
12. No pets are allowed in the warehouse, with the exception of service animals.
13. All Partner representatives must be courteous and respectful to Food Bank staff, volunteers, and other Partner representatives.
14. Partners are responsible for supplying their own boxes, bags, and coolers when transporting food. If a Partner uses any Food Bank banana boxes, crates, or pallets, the Partner is responsible for facilitating the return of these items.



# FOOD BANK

COALITION OF SAN LUIS OBISPO COUNTY

## Quarterly Report Form

Quarter: \_\_\_\_\_ Jan., Feb., & Mar      \_\_\_\_\_ April, May, & June      Year: \_\_\_\_\_  
                 \_\_\_\_\_ July, Aug., & Sept.      \_\_\_\_\_ Oct., Nov., & Dec.

### PARTNER INFORMATION

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Organization Name: \_\_\_\_\_  
Distribution Address: \_\_\_\_\_  
City: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone \_\_\_\_\_ Fax: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
City: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone \_\_\_\_\_ Fax: \_\_\_\_\_  
Food Program Coordinator: \_\_\_\_\_ Phone: \_\_\_\_\_  
Email: \_\_\_\_\_ Fax: \_\_\_\_\_

### EMERGENCY FOOD PROGRAM

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	Month 1	Month 2	Month 3
Number of Families/Households Served :	_____	_____	_____
<b>Total Number of People Served (A):</b>	_____	_____	_____

### CONGREGATE OR RESIDENTIAL MEAL PROGRAM

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	Month 1	Month 2	Month 3
Number of Families/Households Served:	_____	_____	_____
<b>Total Number of People Served (B):</b>	_____	_____	_____
Number of Meals Served:	_____	_____	_____
Number of Snacks Served:	_____	_____	_____

### AGE BREAKDOWN (A + B)

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	Month 1	Month 2	Month 3
Ages 0-5 Years:	_____	_____	_____
Ages 6-18 Years:	_____	_____	_____
Ages 19-40 Years:	_____	_____	_____
Ages 41-60 Years:	_____	_____	_____
Ages over 60 Years:	_____	_____	_____
<b>Total Number of People Served (A + B):</b>	_____	_____	_____

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

TOGETHER WE BUILD A HEALTHIER COMMUNITY



## Quarterly Report Instructions

### AGENCY PARTNER INFORMATION

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This section should be completed every time a report is submitted. Please print agency name as it appears on invoice and statements from the Food Bank Coalition so that report can be entered accurately into our tracking system.

### AGENCY PROGRAM (DEFINITIONS)

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**Emergency Food Program:** Agency provides groceries to those in need of one-time or short-term food assistance.

**Congregate Food Program:** This is a group meal. Agency prepares and serves meals to walk-in guests, or prepares meals for serving clients off-site. They do not provide shelter to clients.

**Residential Program:** Agency prepares and serves meals to clients to whom they also provide shelter.

### CLIENT DEMOGRAPHICS

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**Number of Families/Households Served:** This can be tracked by a sign-in sheet, bags distributed, etc

**Total Number of People Served:** This number will then be broken down by age and accounts for everyone in household.

**Age Breakdown:** This can be a visual estimate based on experience with clients served.

### RECORD KEEPING

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Record keeping is vital to maintain the integrity of the agency's program. Agencies must keep records that will provide the information necessary to complete quarterly reports. Records must be legible and kept for at least two years.

### HOW & WHEN TO SUBMIT QUARTERLY REPORT FORM

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Reports are due for every program an agency operates by the 15<sup>th</sup> of the month following the end of a quarter, regardless of whether the program was active. If no service was provided by the program for the month, the report should reflect zeros in the appropriate sections.

#### Please submit reports to:

Partner Services Coordinator

Suzie Freeman

- [cell] (850) 835-9924
- [fax] (805) 238-6956
- [email] Partnerservices@slofoodbank.org

#### Please submit reports by (annual due dates):

**Quarter 1** – January, February, and March – due April 15<sup>th</sup>

**Quarter 2** – April, May, June – due July 15<sup>th</sup>

**Quarter 3** – July, August, September – due October 15<sup>th</sup>

**Quarter 4** – October, November, and December – due January 15<sup>th</sup>

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**EMERGENCY FOOD ASSISTANCE PROGRAM (EFAP)  
2017 INCOME GUIDELINES**

<b>MAXIMUM INCOME</b>		
<b>HOUSEHOLD SIZE</b>	<b>MONTHLY HOUSEHOLD INCOME</b>	<b>ANNUAL HOUSEHOLD INCOME</b>
1	\$1,507.50	\$18,090
2	\$2,030.00	\$24,360
3	\$2,552.50	\$30,630
4	\$3,075.00	\$36,900
5	\$3,597.50	\$43,170
6	\$4,120.00	\$49,440
7	\$4,642.50	\$55,710
8	\$5,165.00	\$61,980
9	\$5,687.50	\$68,250
10	\$6,210.00	\$74,520
Over 10	add \$522.50 each	add \$6,270 each

REVISED 4/17

## Food Pantry &/or Meal Sign In Sheet

Individuals who qualify for food assistance include those with disabling injuries or handicaps, low income families and individuals, seniors, the unemployed, and those with financial hardship. By completing this form, you are indicating that you meet at least one of these criteria.

For food assistance provided on \_\_\_\_\_  
(date)

	Print Name	# in Household	0-5 yo	6-18 yo	19-40 yo	41-60 yo	61+ yo
1	<i>John Doe</i>	<i>6</i>	<i>1</i>	<i>2</i>	<i>2</i>	<i>0</i>	<i>1</i>
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