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1. Quick Reference Guide

Ordering Procedures

<table>
<thead>
<tr>
<th></th>
<th>Warehouse Pick-Up</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability</td>
<td>M-F 9am-3pm</td>
<td>M-F 7am-4pm</td>
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<tr>
<td></td>
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<tr>
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<td>Notice</td>
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<td>New &amp; One-off Deliveries:</td>
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<td>5 business days</td>
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<td>Pre-Scheduled Deliveries:</td>
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<td>Ordering Window</td>
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<td>2-3 business days before appt</td>
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<td></td>
<td>(see pg. 24 for details)</td>
<td>(see pg. 24 for details)</td>
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<td>Pick-Up Location</td>
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</tr>
<tr>
<td></td>
<td>1180 Kendall Rd.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>San Luis Obispo</td>
<td></td>
</tr>
<tr>
<td>Contact for</td>
<td>Thomas Loots</td>
<td>Suzie Freeman</td>
</tr>
<tr>
<td>Rescheduling</td>
<td><a href="mailto:tloots@slofoodbank.org">tloots@slofoodbank.org</a></td>
<td><a href="mailto:sfreeman@slofoodbank.org">sfreeman@slofoodbank.org</a></td>
</tr>
</tbody>
</table>

SLO Food Bank Contacts

Partner Services Manager: Suzie Freeman – 805-835-9924 – sfreeman@slofoodbank.org
Program Coordinator: Kelly Boicourt – 805-457-5471 – kboicourt@slofoodbank.org
Receiving & Inventory Manager: Thomas Loots – 805-835-3737 – tloots@slofoodbank.org
Director of Programs: Andrea Keisler – 805-369-9563 – akeisler@slofoodbank.org
Director of Operations: Emily Hansen – 805-235-0919 – ehansen@slofoodbank.org
Chief Executive Officer: Garret Olson – 805-286-0160 – golson@slofoodbank.org
2. Introduction

The SLO Food Bank 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 community organizations 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.
2.1 Our History

The SLO Food Bank was founded in 1989 by a group of community members from churches and other nonprofits 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 20 nonprofit and religious organizations. Today, over 5 million pounds of food pass in and out of the SLO Food Bank’s doors each year. We work with more than 100 nonprofit and community agencies including homeless shelters, schools, recovery homes, food pantries, municipal offices, and religious groups to reach the insecure populations in our county. We also have several of our own direct distribution programs including Neighborhood Food Distributions, Senior Home Delivery Program, Children’s and Seniors’ Farmers Markets, and Breakfast Bags.

The SLO Food Bank works hard to make sure that we can meet the needs of our community as efficiently as possible. We rely on our extensive volunteer base, which numbers over 1,800 strong. These are the people that help us pack produce bags, run public distribution sites, and assist in administrative work. Our staff members work tirelessly to keep things running smoothly and in accordance with the best practices as outlined by Feeding America guidelines.

2.2 Community Food Programs

The SLO Food Bank believes that every San Luis Obispo County resident deserves access to fresh and nutritious food. To achieve this goal, the SLO Food Bank has 10 different programs to meet the needs of the community. We understand that consistent access to nutritious food is a multi-faceted issue, so our programs include education, outreach, and hunger prevention alongside the provision of food to those in need.
Agency Partners

The SLO Food Bank maintains agency partnerships with over 80 nonprofit organizations throughout SLO County, including community pantries, churches, afterschool programs, soup kitchens, and recovery homes. While our primary role is to ensure that these nonprofits have access to affordable and wholesome food to keep their pantries stocked and meal sites open, we also work as a resource and advocacy group for this countywide hunger-relief network.

Breakfast Bags

When school is out for the summer, school lunch programs continue, but breakfast programs take a hiatus. Our Breakfast Bag program exists to help fill that hunger gap for youth under the age of 18. The SLO Food Bank works with various organizations and schools throughout the county to help distribute Breakfast Bags to children that may need food assistance over the summer months. Each Breakfast Bag is a reusable drawstring backpack filled with three weeks’ worth of shelf-stable, nutritious, and easy-to-prepare breakfast items.

CalFresh Outreach

In partnership with the County of SLO Social Services offices, the SLO Food Bank promotes access to CalFresh food benefits among its participants. The objective of these efforts is to bring awareness to the CalFresh program and related subprograms, identify and minimize barriers to enrollment, and assist people with the application process.

Children’s Farmers’ Markets

The Children’s Farmers’ Market program offers an interactive educational experience that allows children the opportunity to learn how to budget, navigate a farmers’ market, and pick out produce, all while gathering nutritious food to take home to their families. Various bulk
produce items are set up farmers’ market style with signage and pricing, and children are given bags and play money (Food Bank bucks) to shop around with.

**Health Equity Project**

The Health Equity Project is a yearlong effort to perform a thorough and countywide assessment of the food and health needs among those that may be in need of or receiving food assistance. The results of this assessment will help the SLO Food Bank identify the most needy neighborhoods in the county and construct a number of recommendations on how to best serve them.

**Neighborhood Food Distributions**

Our Neighborhood Food Distributions are free to income-eligible recipients, open to the public, and strategically located in every community countywide. These distributions are held at a variety of sites including community centers, schools, and other public spaces and are run by SLO Food Bank staff, committed volunteers, and community partners at 65 distributions per month at 52 locations. At these distributions, recipients can obtain a variety of foods including bags of fresh produce, bags of shelf-stable food, and meat products. Additional foods such as dairy products or bread are subject to availability.

**No-Cook Bags for the Homeless Program**

There is a clear need to provide nutritious food to those experiencing inconsistent housing in the county while being mindful of the challenges faced by this vulnerable population. The No-Cook Bags for the Homeless Program intends to meet this need by providing each participant a day’s worth of food. The various food items in each bag are curated to meet the unique needs of houseless individuals who may have limited access to a kitchen.
Nutrition Education Outreach

The SLO Food Bank’s multifaceted nutrition education outreach program focuses on increasing participants’ food literacy. Participants are given information on how to prepare the ingredients they receive through our various program outlets as well as information on how to access and make the most of other food resources. The nutrition program aims to give participants the tools they need to make healthy and informed dietary choices.

Seniors’ Farmers’ Markets

Many seniors live on a fixed income and face challenges with mobility, lack of transportation, and isolation. SLO Food Bank provides monthly deliveries of fresh produce to various retirement communities throughout SLO County. This produce is set up farmers’ market style, and the residents of these communities are given the opportunity to choose as much produce as they would like, free of charge. This program allows for increased access to nutritious food as well as an improved sense of community for the groups of residents that attend.

Senior Home Delivery Program

The SLO Food Bank is now equipped to deliver groceries on a weekly basis directly to the homes of low-income older adults who are homebound due to access barriers or other reasons such as medical vulnerability, especially amid the Covid-19 pandemic. Through a partnership with Ride-On Transportation and Wilshire Community Services, we are ensuring that one of our most vulnerable populations can have access to nutritious food.

If you would like to facilitate or host any of the programs listed above, please contact the Partner Services Manager and they may redirect your request to the appropriate program manager or coordinator.
2.3 Our Food Sources

The SLO Food Bank relies on several different sources to make sure we can supply our Partners with a variety of nutritious foods. Fresh produce is sourced through the California Association of Food Banks (CAFB) and from local donors through our GleanSLO program. Shelf-stable, frozen, and perishable food items come from a variety of sources. Food purchases are made from vendors who specialize in work with food banks; the purchasing power we have by being able to purchase pallets or truckloads of food ensures we get the best price available. Grocery rescue also makes up a sizeable portion of the food we distribute, allowing us to divert otherwise suitable food away from waste facilities and to our neighbors in need. In-kind food donations are another source; these are primarily large-scale food donations, neighborhood food drives, and household donations.

Networks

The SLO Food Bank participates in two wide-reaching networks: Feeding America and the California Association of Food Banks. These two groups 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.

Grocery Rescue

One of our two Food Rescue programs, Grocery Rescue is made possible by our partnerships with numerous grocery stores in the area to rescue produce, meats, dairy, prepared foods, and shelf stable goods. Partners may be eligible to participate directly in these grocery rescues based on program size, needs, and reporting capabilities.
GleanSLO

Another one of our Food Rescue programs, GleanSLO works with local farms and home gardeners to gather excess produce from their fields, orchards, and home gardens for redistribution through our Agency 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. Agency Partners with capacity are eligible for direct participation in the GleanSLO program, with freshly harvested produce delivered directly to their location.

Food Drives

Most of our shelf-stable foods come from food drives organized by the SLO Food Bank, schools, small businesses, and other nonprofits. Large food drive campaigns such Stamp Out Hunger, Food for Fines, Hope for the Holidays, and Season of Hope allow us to maintain a consistent and varied supply of shelf-stable food items.

Government Support

The SLO 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 Agency Partners.

Bulk Purchasing

The SLO Food Bank purchases staple food items in bulk from different wholesalers and suppliers to ensure that there is a wide variety of pantry and meal essentials available to Agency Partners. While this was previously only a small piece of our food procurement strategy, the COVID pandemic and related supply chain issues has made bulk purchasing the
primary strategy for ensuring that the warehouse is properly supplied to meet the needs of the SLO Food Bank’s programs and our Agency Partners.

Despite our best efforts and varied supply strategy, the SLO Food Bank 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 Agency Partners. Because of this, we ask all Agency Partners to be aware of these limitations and to have other avenues of food procurement available to supplement their stores as needed.
3. PARTNER QUALIFICATIONS

An “Agency Partner” is a nonprofit organization that is a member of the SLO Food Bank’s network and provides food at no cost to the children, elderly, disabled, or low-income patrons it serves. To maintain the integrity and sustainability of our community partnerships, we require that all organizations meet the following qualifications before becoming an Agency Partner:

1. Primarily service to low-income families and individuals, the elderly, and/or infants.
3. Operate a program that incorporates food as part of its intended scope of services.
4. Maintain regularly scheduled or predictable hours or outreach calendar.
5. Maintain service location(s) within San Luis Obispo County boundaries.
6. Maintain the appropriate food safety training certifications required for your program.
7. Agree to biennial site visits and additional site visits as deemed necessary by SLO Food Bank staff.
8. Must distribute food for free within San Luis Obispo County to qualified individuals.
9. Adhere to all applicable Federal, State, and local regulations and statutes relating to the receiving, storing, shipping, processing, and handling of food products.
4. PARTNERSHIP APPLICATION PROCESS

To apply for a Partnership with the SLO Food Bank, each organization will be asked to submit the following paperwork:

- A completed and signed Application for Partnership
- Copy of 501(c)(3) determination letter with tax ID # / EIN
- Copy of appropriate ANSI-accredited food safety certifications
  - California Food Handler’s Card for most applications
  - Food Protection Manager for Full Meal Sites (highly recommended for Limited Meal Sites)
- Copy of SLO County Food Facility Permit (only required for Full Meal Sites)
- Copies of program information documents or brochures

All the above documents may be submitted one of three ways:

- By email to sfreeman@slofoodbank.org
- By fax to (805) 238-6956, ATTN: Partner Services
- By mail: SLO Food Bank, ATTN: Partner Services, 1180 Kendall Rd., San Luis Obispo, CA 93401

The Partner Services team will review your application after receipt of all required documents. If an organization does not submit all documents, then this may delay the application review process.

Following the application review, a SLO Food Bank staff member contacts the applicant to learn more about the program, the current food needs of the organization, and address any questions that arose during the review process. If the organization meets the primary partner qualifications, a Pre-Operational Site Visit will be scheduled.
Pre-Operational Site Visit

The Pre-Operational Site Visit will involve a review of your program operations, food storage and handling procedures, participation tracking protocols, and an opportunity for the SLO Food Bank staff member to learn more about your organization’s impacts on the community and the ways that partnership would benefit the organization and those it serves.

If any concerns are identified that could impact the qualification, ongoing compliance ability, or the safe and fair distribution of food to the organization’s participants, a staff member will identify these issues and lay out which actions must be taken to establish a partnership with the SLO Food Bank. Our goal is to provide a clear pathway for any qualified organization to become a SLO Food Bank Agency Partner.

To prepare for the Pre-Operational Visit, please review “Pre-Operational & Annual Site Visits” on page 13 and “Program Requirements” on page 24.

Warehouse Orientation

Once a nonprofit organization has successfully completed the application review and pre-operational site visit process, representatives from the organization are invited to come to the SLO Food Bank for a Warehouse Orientation. The Warehouse Orientation includes a tour of the SLO Food Bank, an overview of the ordering and shopping appointment procedures (including scheduling their weekly shopping appointment), the billing and payment protocols, and ongoing compliance and reporting requirements. At the end of the Warehouse Orientation, the organization will sign the Partner Contract and have access to the SLO Food Bank’s agency resources and benefits.
5. PARTNER BENEFITS

Through your relationship with us, we hope to continuously aide your program’s access to nutritious food and explore collaborations that help facilitate our joint mission of improving food access for all SLO county residents.

Below is a complete list of benefits that a nonprofit organization enjoys by becoming a SLO Food Bank Agency Partner:

- Access to free and shared-cost nutritious foods through weekly warehouse pick-up appointments
- Access to pantry staples at below-retail prices through the Co-Op Menu
- Access to holiday turkeys at subsidized pricing
- Discounts on ServSafe food safety trainings and associated materials
- Eligibility for grant-funded resource opportunities, including equipment, infrastructure, and food rescue programs
- Priority access to various SLO Food Bank-enabled programs, including Senior Farmers’ Markets, Breakfast Bags, and No-Cook Bags, for qualified organizations
- Opportunities to earn money for food purchases through joint-fundraising events, including assistance from our development team
- Inclusion on the SLO Food Bank’s Distribution & Resource Calendar and Food Locator
- Access to mission-oriented online resources through the Hunger-Relief Network Toolbox
- Highlights of your organization on our social media accounts and in our newsletters
- Media promotion and co-branding opportunities
• Automatic and free annual registration with SLO County’s Environmental Health Services for qualified Limited Service Charitable Feeding Operations
• Local advocacy for your program and its impacts, including letters of support (at the discretion of the SLO Food Bank’s CEO)
• Other benefits provided to Agency Partners through their affiliation with the SLO Food Bank as a Feeding America or California Association of Food Banks partner organization

Establishing Agency Partner status with the SLO Food Bank also enables your organization to enjoy subsidiary privileges and access provided only to organizations affiliated with Feeding America. The SLO Food Bank is a Partner Distribution Organization (PDO) of Feeding America, a national organization that provides hunger relief support to its coalition of food distributors across the United States. Through your affiliation with the SLO Food Bank, you are also a member of the Feeding America network. As a Feeding America-linked organization, all Agency Partners benefit from corporate donor opportunities, access to private grants, and wider access to local food rescue and donation options, which in turn helps us better serve our clients locally.

This affiliation with Feeding America also comes with the agreement to serve those to the best of our abilities, with particular attention made to equitable, fair, and safe food service. The SLO Food Bank utilizes respected resources and operational guidelines provided or
recommended by Feeding America to guide the practices recommended or required by our Agency Partners. These operational conditions pertaining to food safety and equitable and fair food access are regularly monitored across all SLO Food Bank programs and includes the distributions carried out by our Agency Partners. By adhering to these standards and agreeing to regular audits and inspections, we collectively maintain access to numerous resources and, in turn, are better able to serve our community.

In order to maintain access to these benefits, Agency Partners must remain in good standing with the SLO Food Bank by adhering to the guidelines and requirements stated in the Partner Contract and detailed in this Partner Policy & Procedure Handbook. For more information on how an Agency Partner may lose its good standing with the SLO Food Bank, please see VIOLATIONS on page 49.
6. PROCEDURES

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

6.1 Communications

All official communications, including changes to personnel, service hours, and general operations and updated official certificates, must be conducted through official channels.

These communications may be done in one of three ways:

1. Official letterhead sent by mail to the below address:
   
   ATTN: Partner Services
   SLO Food Bank
   1180 Kendall Rd.
   San Luis Obispo, CA 93401

2. Email sent to the Partner Services Manager at sfreeman@slofoodbank.org from an email tied to the organization.

3. Fax on official letterhead sent to (805) 238-6956 with the ATTN: Partner Services.

6.2 Partner Contract

Each Agency Partner is required to have a Partner Contract on file. This agreement outlines the general responsibilities of both the SLO Food Bank and the Agency Partner as agreed upon by the initiation of this relationship.
The contract must be signed by the current director of the organization or parent organization. When a change in leadership occurs, it is the responsibility of the organization to have the new director review and update the Partner Contract. In the case that the Partner Contract is updated, the SLO Food Bank will be responsible for notifying all Partners of any changes. The Partner will have the organization’s director sign the new agreement and return it to the Food Bank within a reasonable amount of time.

6.3 Partner Policy Handbook

The Partner Policy & Procedure Handbook will be accessible to all Agency Partners and may be found online on the SLO Food Bank’s website on the Hunger-Relief Network Toolbox and Agency Portal. Every Agency Partner must maintain a current handbook onsite for reference and clarification regarding program operations and policies.

6.4 Pre-Operational & Biennial Monitoring Visits

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

Once an established Agency Partner, each organization will be visited by a member of the SLO Food Bank staff at least once every 2 years. This visit, known as the Biennial Monitoring Visit, is done to ensure that all programs stay compliant with SLO Food Bank and Feeding America requirements surrounds the safe and equitable distribution of food. An Agency Partner may be subjected to more frequent and/or unannounced site visits if numerous or serious operational or safety concerns have been identified, suspected, or reported.
Below is a list that will be reviewed by SLO Food Bank staff during a Pre-Operational or Biennial Monitoring Visit:

1. Program Information

- Style of program(s) & program-specific requirements:
  
  - **Residential Site** – All food is stored, distributed to, and prepared by residents and program members.
    - ServSafe® Food Handler certification of kitchen or program manager.
  
  - **Basic Food Pantry** – Storage and distribution of whole, uncut produce and prepackaged foods in the manufacturer’s original packaging to the public and/or program participants.
    - Does not distribute raw meat or other potentially hazardous foods (PHFs).
    - ServSafe® Food Handler certification of pantry coordinator.

  - **Expanded Food Pantry** – Storage and distribution of whole, uncut produce, prepackaged foods in the manufacturer’s original packaging, and PHFs to the public and/or program participants.
    - ServSafe® Food Handler certification of pantry coordinator.

  - **Limited Meal Site** – Distribution of ready-to-eat meals intended for immediate consumption with all food either prepared at an off-site commercial kitchen or assembled/reheated on-site directly from manufacturer’s original packaging.
    - ServSafe® Food Handler certification of meal site leader(s).
    - Submission of Environmental Health Facility ID(s) for commercial kitchen(s) used for off-site food preparation.

  - **Full Meal Site** – On-site preparation of ready-to-eat meals in a commercial kitchen intended for immediate consumption.
    - ServSafe® Food Protection Manager certification for kitchen supervisor.
• ServSafe® Food Handler certification recommended for all employees and volunteers.
• Food Facility Permit held with Environmental Health Services.

• General operations
  o Populations supported by the Agency Partner
  o Hours of operation
  o Food assistance programming
  o Funding information
  o Current source(s) of food
  o Steps taken to ensure fair distribution of food to all patrons regardless of their race, gender, religion, nationality, sexual orientation, or their participation in religious services or classes
  o Requirements and qualifications for food service
  o Method used for tracking number and age of participants (required for Monthly Statistics)

2. Food Safety

• Verification of required ServSafe® certifications, which are publicly displayed
• Handwashing station with hot water, single-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
• 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 D)
• Use of appropriate storage shelves and cabinets for dry storage
• Cleanliness and sanitation of all food storage and preparation surfaces
• Transportation of all cold food items in coolers with ice/cold packs or with an ice blanket

3. Facility Review
• General cleanliness of surfaces, walls, and floors
• Pest control methods
• Sufficient lighting and visibility
• Trash disposal methods
• Cleanliness, stocking, and general state of the restroom

A full list of all standards reviewed during a monitoring visit may be found in the Site Self-Assessment Checklist, which is available in Appendix X.

6.5 Shared Costs

The SLO Food Bank does charge Agency Partners a shared cost for two types of items: co-op items and shared maintenance fee items.

Co-Op Items

Co-op items, or cooperative buy-in items, are any products that the SLO Food Bank has purchased on the open market and then provides at-cost to Agency Partners. We prioritize purchasing staples that are regularly stocked and used by the various pantries and meal sites we serve. These products may be viewed on the PWW Catalog by filtering for the “Coop” category using the Product Filters, as shown in the figure to the right.
**Shared Maintenance Fee Items**

Most products available to Agency Partners through the SLO Food Bank are considered shared maintenance fee applicable under Feeding America guidelines. Generally, these are any food or non-food items that require SLO Food Bank staff to sort, itemize, store, and distribute prior to reallocation to Agency Partners.

Below is a list of shared maintenance fee items available and their shared cost per pound (as of 7/6/2021):

- **Dairy** ($0.00/lb) – milk, yogurt, sour cream, butter, margarine, and cheeses
- **Bread & pastries** ($0.00/lb) – fresh bread, cookies, and baked goods
- **Produce** ($0.00/lb) – all fresh fruit and vegetables
- **Meat & seafood** ($0.19/lb) – meat, poultry, seafood, and deli meats
- **Shelf-stable rescue (SSR) items** ($0.19/lb) – frozen foods, canned goods, dry goods, etc.
- **Non-food rescue items** ($0.19/lb) – diapers, pet products, personal care products, cleaning supplies, paper goods, etc.

**Grant-Funded Products**

The SLO Food Bank regularly pursues funds for food through various grants and gift opportunities. When these opportunities arise, the foods purchased using these funds are available at no-cost to Agency Partners. These products span all the categories available through the Product Filters and may be only identified by the $0.00/case cost.
6.6 Product Allocation & Agency Size

The SLO Food Bank does its best to distribute both food and non-food items to its Agency Partners in a fair and equitable way. Because of this, Agency Partners serving more people or providing services to a specific demographic of disproportional need will receive priority for items that are in limited supply. For example, the SLO Food Bank may prioritize distributing diapers to women’s shelters over other programs.

Agency Partners are labeled with a certain size designation that is determined by the average number of people and households their program serves each month. This average number is recorded through the agency’s monthly reports. The Agency Size designation (either Small, Medium, or Large) helps the SLO Food Bank equitably allocate our inventory based on the needs of each agency. The amount of each product an agency can order from our warehouse is based on this size designation.

Below is a list of Agency Size designations and the requirements to meet these designations:

<table>
<thead>
<tr>
<th>Agency Size</th>
<th>Community Impact (Must meet one or the other of these minimum number served)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Min. # of People Served</td>
</tr>
<tr>
<td>Small</td>
<td>0 people per month</td>
</tr>
<tr>
<td>Medium</td>
<td>150 people per month</td>
</tr>
<tr>
<td>Large</td>
<td>300 people per month</td>
</tr>
</tbody>
</table>

These designations are re-evaluated on biannual basis, though an Agency Partner may request a re-evaluation sooner than that if their community impact has significantly increased. For Agency Partners that have specific seasons or months of distribution, the Agency Size designation will only be based on the average numbers served during months of active service.
6.7 Warehouse Appointment

The warehouse is the main hub of all SLO Food Bank activities including food procurement. Agency Partners are able to come to the warehouse and pick-up nutritious produce, breads, proteins, and shelf-stable goods for distribution at their pantry, meal site, or residential program. Due to the busy nature of our warehouse, all agency pick-ups are by appointment only. Each appointment is a 30-minute window scheduled between 9:00am and 3:00pm, Monday through Friday. All aspects of warehouse shopping (arrival, check-in, loading, and check-out) must be completed within the 30-minute shopping appointment window. Appointments may be recurring on a weekly or fortnightly basis.

Scheduling a Warehouse Appointment

To schedule a warehouse appointment, an Agency Partner must contact the 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. The Clerk requires 24-hour notice if an organization must make a new warehouse appointment or cancel their existing one. Early arrivals will not be able to shop until their assigned shopping time unless previous arrangements have been made with the Clerk.

Tardiness and Absenteeism

The Agency Pick-up door at the SLO Food Bank is always busy servicing both Agency Partners and other organizations participating in SLO Food Bank programs. To help the SLO Food Bank staff serve every organization to the best of their ability, Agency Partners are strongly encouraged to arrive on-time to their appointment. If circumstances cause an Agency Partner to be unable to arrive at their given appointment time, the authorized shopper and/or main
contact for that account should notify the Clerk or the Partner Services Manager as soon as possible.

In the case that an Agency Partner is habitually late or entirely absent during their appointment slot without prior notification and/or coordination with the Clerk, SLO Food Bank staff may temporarily suspend the account of the Agency Partner.

### 6.8 Placing an Order

An Agency Partner must place their order through Primarius Web Window (PWW), the online-based inventory system used by the SLO Food Bank, during the appropriate ordering window for the Agency Partner’s assigned pick-up or delivery day.

**Primarius Web Window**

Please see the Primarius Guide for Agency Partners in Appendix B to learn how to review available inventory, place an order, view order status, and review previous orders. This guide may be found on the Hunger-Relief Network Toolbox page on slofoodbank.org under Agency Partners and in Appendix C of this document.

**Ordering Window**

An order must be placed during the Ordering Window specific to an Agency’s assigned pick-up or delivery day. The Ordering Window opens three days before the pick-up/delivery day and closes the midnight one full business day before the pick-up/delivery day. For example, the Ordering Window for an Agency Partner with a Thursday shopping appointment would open at 12:01am Monday morning and close at 11:59pm Tuesday night. To allow each Agency Partner sufficient time to order, the Ordering Window may be extended to 3 days when the window overlaps with a weekend.
Below is a graphic that depicts the Ordering Windows for each pick-up/delivery day:

Since the Ordering Window extends past regular office hours of the SLO Food Bank, Agency Partners should not expect any member of the SLO Food Bank staff to answer questions about their order or assist with technical difficulties before 8:00am or after 4:00pm on weekdays.

**Order Changes**

To make any adjustments to an order after submission, please contact the Clerk. If the adjustment request is made during the Ordering Window, then the request may be honored, subject to product availability. If the adjustment request is made after the Ordering Window, i.e. less than 1 full business day before the scheduled pick-up/delivery day, the Clerk may determine whether to meet the request based on the availability of staff and volunteers and on product availability.
Order Cancellation

In the case that the Agency Partner has submitted an order and is no longer able to pick up that order, the Agency Partner must notify the Clerk in writing (email) or by phone before their assigned appointment time. If an Agency Partner fails to notify the Clerk by their appointment time, this is considered a “no-show.” If an Agency Partner has 3 no-shows during a calendar year, the Agency Partner’s account may be temporarily suspended for up to 3 months at the discretion of SLO Food Bank staff.

Authorized Shoppers

Each Agency Partner will be asked to designate representatives that they authorize to order and pick up and select food for their organization, called Authorized Shoppers. To ensure the integrity of the program and the safety of Food Bank staff and volunteers, only these Authorized Shoppers are permitted to pick up product on behalf of an Agency Partner from the warehouse during their appointment time.

To identify an individual as an Authorized Shopper for your organization, add that person’s information as a Contact for your account via PWW and assign the Authorized Shopper role to their profile.

Pick-Up

At the time of the appointment, the Authorized Shopper can park their vehicle on the western side of the Food Bank warehouse in front of the roll-up door with the sign that reads “Agency Pick-Up.” After parking, please ring the doorbell on the western door and the Clerk will permit the Authorized Shopper(s) to enter and proceed with an appointment.
Each Agency 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. If the Agency Partner borrows any crates, banana boxes, or other containers from the SLO Food Bank, these items should be returned to the warehouse within a week.

6.9 Agency Deliveries

Agencies may qualify to receive deliveries at no-charge when their order meets the minimum size requirements and with prior coordination with the Partner Services Manager. Agency deliveries may be as-needed or recurring based on the needs of the Agency Partner and the availability of SLO Food Bank staff and equipment.

Delivery Weight Minimums

To qualify for a delivery, an Agency Partner must meet certain weight limits on either a per order (for one-time deliveries) or per month basis (for recurring deliveries).

One-Time Deliveries

For a one-time delivery, each order must weigh at least 1,200 lb. An Agency Partner may verify that their order meets the minimum weight during the check-out process, as shown in the figure to the right. The amount circled in red indicates the PWW weight estimate for the order—this value must read 1200.00 or higher for the order to qualify for free delivery.
NOTE: An Agency Partner must contact the Partner Services Manager at least 5 business days before the desired delivery date, as detailed on page 33.

Recurring Deliveries

To create a consistent delivery schedule that is predictable for the staff and volunteers of both SLO Food Bank staff and the Agency Partner, the minimum weight requirements for a regularly recurring delivery are determined by the weight received by the Agency Partner monthly through the SLO Food Bank and its community programs. The chart to the right shows the minimum monthly weights that an Agency Partner must be receiving from the SLO Food Bank to qualify for recurring deliveries.

This monthly weight is calculated by the total weight received by an Agency Partner from the SLO Food Bank and its community programs and does not include the weight of the product received through the organization’s own Agency-Direct Rescue efforts. Agency Partners are encouraged to choose either recurring deliveries or warehouse pick-up appointments, but exceptions may be made at the discretion of SLO Food Bank staff.

Monthly poundage will be evaluated at the end of each month to verify an Agency Partner’s continued qualification to receive recurring deliveries of a certain frequency. In the case that an Agency Partner is receiving below the minimum monthly poundage, they will be notified by the SLO Food Bank staff and asked to increase their poundage for the next month. If the Agency Partner does not meet the minimum monthly poundage requirement two months in a

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Minimum Monthly Poundage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly</td>
<td>5,000lb</td>
</tr>
<tr>
<td>Bimonthly*</td>
<td>2,400lb</td>
</tr>
<tr>
<td>Monthly</td>
<td>1,200lb</td>
</tr>
</tbody>
</table>

*In this case, bimonthly means deliveries every 1st & 3rd or 2nd & 4th weeks of the month.
row, they will be asked to either reduce the frequency of their deliveries or return to weekly warehouse pick-ups.

Accessory Deliveries

An Agency Partner may also request an order to be delivered in conjunction with the delivery of an existing non-Partner Services program, called an accessory delivery. In these circumstances, an Agency Partners may request to receive their agency account order with the same delivery provided that the order weighs at least 500lb according to the PWW weight estimate.

For example, if there is a previously scheduled drop-off for a Neighborhood Food Distribution at an agency location, then the agency may request that their agency account order be included with that same delivery provided that the order is over 500lb. In these circumstances, the Agency Partner must notify the Partner Services Manager of this request 5 business days before the delivery date.

Combining Deliveries from Multiple Agency Partners

Multiple Agency Partners are able to combine their orders to meet the minimum delivery weight requirements for recurring or one-time deliveries. These orders must be delivered to the same location and be coordinated with the Partner Services Manager at least 5 business days before the requested delivery date.

Requesting a Delivery

To schedule a one-time delivery, the Agency must contact the Partner Services Manager with a minimum of 5 business days’ notice prior to the desired delivery date. The same policy applies to accessory deliveries.
To schedule a new, *recurring delivery*, the Agency Partner must contact the Partner Services Manager with a minimum of 5 business days’ notice prior to the first delivery date, though 2 weeks is preferred. Recurring deliveries may be on whatever predictable schedule mutually works for both the Agency Partner and the SLO Food Bank if it is no more than once per week. Once a recurring delivery is scheduled, the SLO Food Bank will maintain the agreed upon delivery slot until it is otherwise coordinated with the Agency Partner.

A delivery request may be denied by SLO Food Bank staff regardless of whether the order otherwise qualifies for delivery in the case that the delivery is unable to be serviced due to SLO Food Bank equipment and staff availability. In the case that there are more recurring delivery requests than can be met by SLO Food Bank staff, the requesting Agency Partners will be placed on a waiting list.

**Ordering a Delivery**

Once a delivery has been arranged through the Partner Services Manager, an Agency Partner may place their order through PWW during the normal ordering window. During check-out, please verify that the “Is Delivery” box is selected on the PWW Check-Out screen. If this is not selected, please contact the Partner Services Manager as this option must be changed by a SLO Food Bank staff member.

**Re-Scheduling a Recurring Delivery**

In the case that a recurring delivery must be re-scheduled by an Agency Partner, either one time or on an ongoing basis, please contact the Partner Services Manager.

When the SLO Food Bank is closed in observation of a national holiday, the Clerk will coordinate directly with an Agency Partner to reschedule their delivery.
6.10 Order Errors

If there is any issue with your order, please contact the SLO Food Bank within 24 hours of picking up or receiving your order. It is the responsibility of the Authorized Shopper to verify that the order being received is complete and correct compared to the corresponding invoice. If an Agency Partner received damaged or incorrect food items, they may be eligible for exchange or account credit reimbursement.

6.11 Payment Guidelines

At the completion of each transaction, an Agency Partner will have access via PWW to an invoice detailing the items and/or services received through the SLO Food Bank. On the first of each month, an Agency Partner will receive an automatically produced and issued monthly statement for the preceding month.

Payment Terms

Payment for the services and goods rendered will be due 30 days following the receipt of the monthly statement. After 30 days of non- or insufficient payment, the Agency Partner will be given notice that payment is overdue and late, though access to goods and services will remain unaffected. After 60 days of non- or insufficient payment, the Agency Partner will only be able to access products and services that are available to all Agency Partners at no cost. After 90 days of non- or insufficient payment, the Agency Partner will no longer have access to any of the SLO Food Bank’s resources until the Agency Partner’s payment obligations are met in full.
This same information is shared in the table below:

<table>
<thead>
<tr>
<th>Days Past Statement Date</th>
<th>Account Impacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 to 29 days</td>
<td>None – account in good standing</td>
</tr>
<tr>
<td>30 to 59 days</td>
<td>Email notification of past due payment</td>
</tr>
<tr>
<td>60 to 89 days</td>
<td>Account access limited to food available at no-cost only</td>
</tr>
<tr>
<td>90+ days</td>
<td>Account suspended</td>
</tr>
</tbody>
</table>

If there is an extenuating circumstance that prevents the Agency Partner from meeting their accrued debt to the SLO Food Bank and the Agency Partner still requires access to SLO Food Bank resources, the organization may file a request to the Chief Executive Officer for an extension of their payment terms and/or continued access to SLO Food Bank resources despite non-payment.

No prepayments are accepted nor are any credits maintained by the SLO Food Bank. In the case that a donation is made to the SLO Food Bank on behalf of one of its Agency Partners, that payment will be sent to the Agency Partner.

**Payment Options**

Agency Partners are encouraged to make regular payments following the receipt of the monthly statement. The SLO Food Bank accepts payments through the following methods:

- Check
- Money order
- Cash in a completed designated envelope

For all checks and money orders, please indicate the Agency Reference Code and invoice
numbers and/or monthly statement date in the memo line.

Payments may be either mailed to **ATTN: Partner Services, SLO Food Bank, 1180 Kendall Rd., San Luis Obispo, CA 93401** or dropped off in the secure **Agency Payment Box** located near the Agency Pick-Up door.

The SLO Food Bank is currently unable to accept credit/debit card payments.

**Returned Check Policy**

In the case that a check is returned for insufficient funds, the SLO 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 orders, cashier’s checks, or cash for all future payments.

**Joint-Fundraising Opportunities**

The SLO Food Bank offers its Agency Partners joint-fundraising opportunities throughout the year to enable organizations the ability to fundraise for their nonprofit’s unique needs. Within 60 days of the conclusion of each event, the SLO Food Bank will distribute funds to the participating Agencies by check. These distributed funds are intended to be used only for purchases and/or operations needs that directly contribute to hunger-relief efforts within SLO County and will include a Restricted Gift Agreement to be signed by the recipient Agency Partner’s Executive or Director.
7. 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 SLO Food Bank is a Feeding America Partner Distribution Organization (PDO) and, therefore, subject to the compliance guidelines of Feeding America. As a PDO, the SLO Food Bank and its Agency 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.

7.1 Statistics

Every Agency Partner is required to submit Statistics regarding their program’s community impact on a monthly basis. This monthly report captures the number of participating households and individuals served by an Agency Partner, the age demographics of those served, and, for pantries and meal sites, the number of days food assistance is offered. The SLO Food Bank uses this information to report SLO County hunger needs, determine community need, prioritize resources, identify potential programmatic collaborations and partnerships, and allocate population-specific foods and resources. Neither the SLO Food Bank nor Feeding America requires any form of participant identification.

The Statistics tab on Primarius/PWW is where Agency Partners submit their monthly reports. Statistics must be submitted monthly to maintain consistent access to SLO Food Bank products. The statistics submission window for each month opens 7 days before the end of that month and closes at midnight on the 7th day of the next month.
To submit statistics using Primarius/PWW, select the **Statistics** tab from the navigation bar after logging in. As shown below, you can view previous submissions and make new ones. Click the green *Add New Agency Statistics* button in the right-hand corner to create a new submission.

On the **Agency Statistics** page, you can view previous submissions and make new ones. Click the green *Add New Agency Statistics* button in the right-hand corner to create a new submission. A drop-down menu will appear, as shown below, which you will use to select the month you are reporting for. After a month is selected, click the green *Save* button to go to the next step.

You will then see the list of questions to fill out for your agency pertaining to the service you provided the community during the month.

Different types of agencies will see slightly different questions based on the nature of food service they provide. If an agency offers multiple types of food service types, they may see a combination of the statistics questions.
Here is a list of the types of statistics each agency is expected to report based on the type of food service program they provide:

<table>
<thead>
<tr>
<th>Pantry</th>
<th>Meal Site</th>
<th>Residential</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Total # of Families/ Households Served</td>
<td>A) Total # of Families/ Households Served</td>
<td>A) Total # of Families/ Households Served</td>
</tr>
<tr>
<td>B) Total # of People Served</td>
<td>B) Total # of People Served</td>
<td>B) Total # of People Served</td>
</tr>
<tr>
<td>C) Total # of Young Children Served (Age 0-5)</td>
<td>C) Total # of Young Children Served (Age 0-5)</td>
<td>C) Total # of Young Children Served (Age 0-5)</td>
</tr>
<tr>
<td>D) Total # of School-Aged Children Served (Age 6-17)</td>
<td>D) Total # of School-Aged Children Served (Age 6-17)</td>
<td>D) Total # of School-Aged Children Served (Age 6-17)</td>
</tr>
<tr>
<td>E) Total # of Adults Served (Age 18-59)</td>
<td>E) Total # of Adults Served (Age 18-59)</td>
<td>E) Total # of Adults Served (Age 18-59)</td>
</tr>
<tr>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
</tr>
<tr>
<td>G) # of Days Pantry Open to the Public</td>
<td>I) # of Days Meals Were Served to the Public</td>
<td></td>
</tr>
<tr>
<td>H) # of Days Pantry Open Only for Program Participants</td>
<td>J) # of Days Meals Served Only to Program Participants</td>
<td></td>
</tr>
</tbody>
</table>

You can make edits to the numbers throughout the day that the submission was created. On the next day, editing will be locked and any corrections will need to be made by either the Partner Services Manager or Community Programs Coordinator.

**NOTE:** The number of families/households, people, and the age demographics should be *unduplicated* over the course of the month. For example, if you serve a single family of 5 three times during May, then that family would only count as 1 family/household served and 5 individuals and *not* as 3 families and 15 individuals.

As previously mentioned, statistics must be submitted monthly to for an Agency Partner to maintain consistent access to SLO Food Bank resources. If an Agency Partner does not submit
their Statistics by the 7th day of the next month, a pause will automatically be placed on the account. This pause will be immediately removed once they are submitted through PWW/Primarius.

For full details on how to submit Statistics using PWW/Primarius, please view the “Statistics” section of the Primarius Guide for Agency Partners document, available both on the Hunger-Relief Network Toolbox and in Appendix B of this document. For additional information on how to correctly complete the Statistics, please view the Statistics FAQ document, available both on the Hunger-Relief Network Toolbox and in Appendix C of this document.

7.2 On-Site Records

In addition to Statistics, each Agency Partner is required to maintain records of their program participation and outreach 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 Statistics (i.e. individuals served, households served, and age demographics of those served). The SLO Food Bank recommends that each Agency Partner establish a method of tracking that is most appropriate for their program(s).

A SLO Food Bank employee may request to view these records during a biennial site visit.

7.3 Invoices

Agency Partners must maintain all SLO Food Bank invoices for 2 years. A SLO Food Bank employee may request to view these records during a biennial site visit. Maintaining access to an account’s invoices through Primarius Web Window is sufficient to meet this requirement.
7.4 Agency-Direct Rescues

All Agency Partners participating in the Agency Direct Rescue (ADR) program must agree to adhere to policies as outlined in SLO Food Bank’s Agency Direct Rescue Participation Form, found on the SLO Food Bank Hunger-Relief Network Toolbox, and are required to send a weekly report of all food rescued through the ADR program to the Food Rescue Manager at foodrescue@slofoodbank.org. Agency Partners wishing to participate in this program or get more information about the ADR program can find more information at https://www.slofoodbank.org/food-rescue/.

7.5 Other Food Bank-Enabled Programs

The SLO Food Bank hosts a number of food assistance programs, including Neighborhood Food Distributions, No-Cook Bags for the Homeless, Children’s Farmers’ Markets, Seniors’ Farmers’ Markets, and Breakfast Bags. These programs and those like them are considered “food bank-enable programs,” where the SLO Food Bank may maintain control over the timing and format of the distribution, but the distribution itself is often carried out by third-party organizations.

All Agency Partners participating in ones of these programs must have a current program-specific agreement or MOU on file with the SLO Food Bank, though there are no other reporting requirements beyond completion of the monthly Statistics report through Primarius/PWW. Agency Partners that only use food through one of these food bank-enabled programs still must complete their Statistics. Failure to complete these Statistics may impede on the Agency Partner from engaging in food bank-enabled programs into the future.
7.6 Surveys

Agency Partners are often asked to participate in surveys to gather information about the program’s impact and experiences, outreach strategies, and usage of SLO Food Bank resources. The results of these surveys are used to improve the offerings of the SLO Food Bank, social services and resource offerings in SLO County. While participation in these surveys is encouraged, it is not mandatory.
8. 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.

8.1 Patron Qualifications

All patrons of any SLO Food Bank-supported program or Agency 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. 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 SLO Food Bank-sourced food and resources. Residential programs are permitted to charge patrons for room, board, and other associated residential costs.

8.2 Product Handling & Storage

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

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, traps, and/or spraying schedule, as required
- The Agency Partner is responsible for ensuring that SLO 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 SLO Food Bank-sourced product
- All food storage areas must be clean, dry, and well ventilated
• SLO Food Bank-sourced product may not be stored or prepared at a private residence unless done in a way that distinctly separates the SLO Food Bank-sourced product from personal-use foods, including dedicated and isolated refrigerators, freezers, and shelving
• All transportation of refrigerated or frozen foods must be done in a way that maintains the integrity and safety of the products, including temperature control
• All non-food items, including cleaning products, must be stored separately from and/or below food items:
  o Chemicals and cleaning products may never be stored above or on the same shelf as food items
  o Any toxic items must be stored completely separate from all food items
• It is also suggested that Partners use the following best practices:
  o A “first in, first out” policy to ensure regular turnover of foods
  o All shelving 18” away from walls to deter pests

Cooking Facilities
• All facilities used for preparing meals for Full and Limited Meal Sites must be Permanent Food Facilities as defined by Environmental Health of SLO County
  o Limited Meal Sites may reheat and/or assemble meals at the serving location
• Food prep surfaces, including sinks, counters, and stovetops, must be kept cleaned and free of any nonfood-related items
• Cleaning and sanitizing protocols should be followed before and after every meal service
• Full Service Meal Sites must have a three compartment sink or a dishwasher on site
• Limited Service Meal Sites must use disposable plates, bowls, and utensils

Dry Storage
• All food products must be stored off the floor in a 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 Food 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
• Agency Partners are encouraged to monitor temperatures on an appropriate temperature log – an example temperature log can be found in Appendix E of this document
• All refrigerators must be clean and in working order
• SLO Food Bank-sourced food should be stored in a dedicated refrigerator not comingle with personal food
  o 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 Appendix E of this document
• All freezers must be clean, in working order, and have minimal frost/ice build-up
8.3 Service Operations

An Agency Partner must hold a program on a set schedule with regular, advertised hours. The SLO Food Bank must be notified of service hour changes via email or letter. This is true for both public distributions that accept outside referrals and closed sites only open to a 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 by a SLO Food Bank staff member.

8.4 Inappropriate Use of Food Bank-Sourced Food

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

SLO 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. In addition, SLO Food Bank products may not be used as prizes for any contests or charity events.

SLO Food Bank-sourced food may not be used for any religious functions regardless of patron qualification, nor may it be served at church dinners, religious classes, or during religious text studies. 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 food distributions or any Food Bank-affiliated program. Annual shared and community meals to celebrate a religious holiday are allowed provided that client participation in religious services is not a precondition of meal participation.
SLO Food Bank product may not be consumed or used by the Agency 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 SLO Food Bank product after patron meals and/or snacks are served. Priority must always go to the patrons of the program.

2. Program staff members that meet the financial qualifications may participate in Agency Partner meals and/or receive pantry food assistance. These individuals must be accounted for in SLO Food Bank and Agency Partner records like any other distribution and may not receive any preferential treatment or food choices.

**8.5 Voluntary Contributions**

An Agency Partner may not charge or accept any donations from patrons to cover any operating or food expenses associated with their program during the time of service. Any organization found to be asking patrons for tips, suggested donations, or other monetary contributions may be immediately terminated as an Agency Partner.
9. 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.

9.1 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 concerns. Examples include absence of handwashing sign(s) in the bathroom, missing thermometers in otherwise operational refrigerators, or incomplete record keeping procedures.

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

1. Identification and evaluation of the issue.
2. On-site discussion and subsequent issuance of a written statement explaining the issue(s) and the necessary corrective action(s).
3. In cases where the issue may reasonably lead to a foodborne illness, incorrect reporting, or discriminatory distribution of food, a follow-up corrective action visit will occur within 6 months to determine if the violation has been corrected in a timely manner and to a suitable standard.
4. If the violation has not been corrected, then the Agency Partner will be given a written explanation of the ongoing violations.
5. A second unannounced follow-up visit within 3 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 Agency Partner’s account will be placed on suspension, and the Agency Partner will no longer have access to SLO Food Bank resources.

7. To be removed from suspension, the Agency Partner must set up a site visit for reinstatement.

8. If the Agency Partner remains on hold for 6 months, they will be made inactive. The organization must reapply as a new Agency Partner if they wish to regain access to SLO Food Bank resources.

9.2 Major Violations

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

Below are some examples of major violations:

- Exchange of SLO Food Bank-sourced food for money, goods, or services
- Use of SLO Food Bank-sourced food for reasons other than distribution to eligible patrons
- Willful disregard for or negligence of adequate safe food handling procedures
- Excessive delinquency in payments
- Failure to distribute SLO Food Bank-sourced food to eligible patrons
- Termination of 501(c)(3) tax-exempt status
- Inability to provide evidence of food safety trainings for necessary staff or volunteers
- A violation of any federal, state, or local statute, ordinance, code, or regulation
- Grossly inaccurate or fabricated records or reporting
- Failure to submit statistics for 3 consecutive months
- 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 suspension, with an explanation of the violation(s) and the step(s) necessary to regain and retain good standing with the SLO Food Bank.

2. A re-evaluation of the organization’s program to determine if the violation(s) 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 SLO 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 3 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 Agency Partner if they wish to regain access to SLO Food Bank resources.
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II. Primarius Guide for Agency Partners ........................................................................ 54

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V. Temperature Log .......................................................................................................... 83

VI. Pantry Sign-In Sheet .................................................................................................... 84
SLO Food Bank Warehouse Rules for Agency Partners

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 SLO Food Bank prior to allowance into the warehouse.

2. Only two authorized shoppers per Agency Partner are permitted in the warehouse at a time. One assistant is permitted for shoppers that may require additional support.

3. Each Agency 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. Please see page 16 for more details.

4. Agency Partners order from the Inventory Menu before their appointment and SLO Food Bank staff will prepare the order for pick-up. Authorized shoppers are allowed to shop from designated areas only. Self-curation of SLO Food Bank inventory is never allowed for reasons of safety and program integrity.

5. Agency Partners are permitted to self-select bread, dairy, prepared foods, meat, non-food shelf-stable rescue, and shelf-stable rescue depending on availability.

6. Agency 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. Agency Partners are responsible for loading their own vehicles.

9. Anyone in the warehouse is required to always wear closed-toe shoes.

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, except for service animals.

13. All Agency Partner representatives must be courteous and respectful to SLO Food Bank staff, volunteers, and other Agency Partner representatives.

14. Agency Partners are responsible for supplying their own boxes, bags, and coolers when transporting food. If an Agency Partner uses any SLO Food Bank banana boxes, crates, or pallets, the Partner is responsible for facilitating the return of these items.
Primarius Web Window (PWW) Guide

As of April 2021, the SLO Food Bank has officially transitioned to Primarius 2, a inventory management software designed specifically for food banks and their unique needs. The SLO Food Bank adopted Primarius 2 over other food banking softwares because of the incredibly thoughtful and robust features that it offers for our Agency Partners. Each Agency Partner will be given access to their own account where they can easily place an order, submit reports, review site visit findings, pull up past invoices, and more through the PWW. The PWW, or Primarius Web Window, is an Agency’s direct access to their account and related records at the SLO Food Bank.

To access the SLO Food Bank’s PWW, please go to the Agency Partners page on the SLO Food Bank’s website or use the following url:

https://slofoodbank.primarius.app/pww/Home/Login/

Please bookmark this website for future reference and use.

This Primarius Guide for Agency Partners is intended to be an instructional guide for Agency Partners. This guide will focus on the essential functions of PWW, including ordering food, submitting reports, and maintaining up-to-date contact and programmatic information. This document will be updated to include additional information on how to use the other functions of PWW as the SLO Food Bank begins to incorporate new features for use by Agency Partners.
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Accessing PWW

To access the SLO Food Bank’s PWW, please go to the Agency Partners page on the SLO Food Bank’s website or use the following url:

https://slofoodbank.primarius.app/pww/Home/Login/

Please bookmark this website for future reference and use.

One can also access the PWW through the SLO Food Bank’s website. After going to slofoodbank.org, click Agency Partners in the top green navigation. You will then scroll down to the section of the page titled “Are you an existing Agency Partner?” and click on the Access PWW Account button.

Logging In

Every Agency Partner has a unique account with the SLO Food Bank, whose information may be accessed through PWW. A new Agency Partner will receive the log-in information for their PWW account as part of the onboarding process. Nonprofits with a previously established account at the SLO Food Bank will be given their log-in information shortly before their assigned training session during Late Spring 2021.
To access a PWW account, you will receive three pieces of information.

**Agency Reference:** This is the 4 to 6 letter reference code unique to each Agency Partner.

**User Name:** This is usually the same as the Agency Reference, but may be unique to each user if deemed necessary for an Agency.

**Password:** The private access word to keep your account secure.

Each Agency Partner will be assigned a single User Name for their account to be shared among the representatives of each organization. The SLO Food Bank recommends sharing PWW access with all Authorized Shoppers and any individuals responsible for submitting reports to the SLO Food Bank. If there is a specific need to have multiple User Names for the same account, the SLO Food Bank is able to meet this need on a case-by-case basis as determined by the Partner Services Manager.

While there will be a single account with a single Agency Reference code assigned to each nonprofit in most cases, a nonprofit may have multiple accounts if the nonprofit runs several programs with independent financial and/or programmatic responsibilities that are each accessing the SLO Food Bank’s food resources and partner benefits.

**Resetting Your Password**
During the first log-in to the PWW, an Agency will be asked to change their Password from the temporary one provided by the SLO Food Bank. The Password you choose will be unique to the Agency Reference-User Name and should only be shared with those associated with your nonprofit’s food programs operations, such as program coordinators, Authorized Shoppers, and those responsible for submitting reports to the SLO Food Bank on behalf of your organization.

**Changing Profile Settings**
In the case that an Agency needs to change their Username, Password, or the email
address associated with the Agency’s PWW account, this may be done in one of two ways:

1. After clicking the user icon in the right-hand side of the navigation bar, select *Edit My Profile* to be taken to a page to change the access information associated with an Agency’s PWW account.

2. If for some reason the access to the Agency’s PWW account is lost or compromised, an Executive or Director from the nonprofit may contact the Partner Services Manager to reset the account information.

**My Agency**

In the upper right-hand of the navigation bar is a user icon that can lead to the *My Agency* page, which captures many of the day-to-day communications and operations of an Agency Partner. All organizations should do their best to make sure all the information captured here is up to date.

**Details**

The *Details* tab captures the basic information of an Agency Partner, including the main contact, main site address, agency size designations, and site visit information. The information shown on this page can only be changed by SLO Food Bank staff. If the information seen here is incorrect, please reach out to the Partner Services Manager immediately.

The **Main Contact** and **Main Address** are the primary contact and address associated with the PWW Account.
The **Agency Size** and **Agency Site Size** are based on the number of people and households served by your organization monthly. These two values should be the same, while the **Agency Pantry Size** value should be blank. Agency Size designations affect the quantity of certain free or shared maintenance fee products your account has access to on the *Shopping List* and are based on the following parameters:

- **Small**: Serves less than 100 people per month.
- **Medium**: Serves 100-700 people per month.
- **Large**: Serves more than 700 people per month.

Agency Size is based on the highest number of households and/or people served during a single month over the course of the previous year. This designation is automatically evaluated on an annual basis, though an agency may request a re-evaluation at any time.

**Addresses**

Each Agency Partner should regularly review and update the different addresses associated with their PWW account. In addition to the basics like stress address, city, and state, we also use Address Types to help determine the use of each address associated with your organization. Many of these roles help improve the SLO Food Bank’s communication with you, while others are essential to the functionality of your account.

The following Address Types are required:

- **PHYSICAL**: Any location where food is stored and/or distributed from by an Agency Partner.
- **Mailing Address**: The address where paper-based communications should be sent.

The following Address Type is recommended:

- **Bill To**: The address where any hardcopy invoices and monthly statements should be sent. (To be used as a back-up to the *Order Email* Contact Type listed below.)
The following Address Types are used for other areas of the SLO Food Bank’s operations, and should *not* be used by an Agency Partner when setting up their account:

**Ship To, Contact, Order Email**

**Contacts**

Each Agency Partner should regularly review and update the different contacts associated with their PWW account. **Note:** Adding someone as a Contact on your account does not automatically grant them access to your Agency’s PWW account unless you share the account credentials with them.  

Below is an example of a completed Contact for an account before saving. Please complete the contact type, first name, last name, title, email address, and telephone fields for each contact.

In addition to the basic contact information like name, phone number, and email, we also use Contact Types to help determine the role of each contact associated with your organization. Many of these roles help improve the SLO Food Bank’s communication with you, while others are essential to the functionality of your account.

The following Contact Types are required:

**Main:** The primary contact on the account for day-to-day communications and relations; should be a single designation per account.

**Administrative:** Responsible for submitting reports and statistics for an Agency Partner; should be a single designation per account.
➢ Receives reminder emails about statistics submission windows

**Agency Email List:** Any contact that should receive regular emails about program updates, new opportunities, and surveys; may be multiple contacts per account.

**Authorized Shopper:** An individual permitted to place and pick-up an order on behalf of an Agency Partner; may be multiple contacts per account.

➢ Receives reminder emails about ordering windows & upcoming warehouse closures

**Order Email:** Will receive any documents sent through PWW, including invoices, monthly statements, etc.; may be multiple contacts per account.

The following Contact Types are recommended:

**Executive:** The CEO, President, or Executive Director of an Agency Partner; should be a single designation per account.

**Program Coordinator:** The primary contact for all order and delivery questions; should be a single designation per account.

The following Contact Types are used for other areas of the SLO Food Bank’s operations, and should **not** be used by an Agency Partner when setting up a new contact:

**AC, Bill To, Contact, NCB, Receiving, Ship To, Site Leader,** and **Food Safety Certificate**

If a contact is no longer associated with your Agency’s PWW Account, please click *Deactivate* on the *Edit Contact* page.

Please note that there may be one or two default contacts on your account that are not tied to any of your personnel. The first one is the “PWW” account, which is the contact associated with the general email associated with your agency. This is usually listed as “Agency Ref Code PWW.” For example, the Pantry at the SLO Food Bank’s PWW account is listed as “PSFB PWW.”

The second default contact is the SLO Food Bank Admin contact. This contact is added to an account to allow a SLO Food Bank employee to access your account and assist in
any troubleshooting as needed.

**Hours**
The public service hours of your organization’s food program should be reflected in the Hours section. An Agency should do their best to ensure that this section is up to date since the SLO Food Bank will be using the information here to populate the Local Pantry & Meal Sites spreadsheet that is widely distributed throughout the county.

**Messages**
While there is a Messages function through PWW, the SLO Food Bank will still use email, text messages, phone calls, and traditional mail service as the official methods of communicating with its Agency Partners.

**PWW Home Page**
The PWW Home Page will be the first thing you see after logging into the PWW. This landing page provides Agency Partners with immediate and easy access to important SLO Food Bank information, including best contacts for common questions, important dates, reporting reminders, and how to access different resources and forms through the SLO Food Bank’s Hunger-Relief Network Toolbox.
Navigation Bar
You will also notice the green navigation bar along the top of the page. This navigation bar allows an Agency to jump to different functional areas of PWW.

Shop: Access to the current catalog of available foods available to all Agency Partners
Allocations: Program-specific food allotments
Agency Pickup: Submit weekly Agency-Direct Rescue reports
Statistics: Submit monthly Statistics reports
Order History: Review active and complete orders
Grants: Feature not used by SLO Food Bank
Other Agency Info: Surveys & questionnaires
My Documents: Access invoices, monthly statements, site visit results, etc.
Reports: Access community impact reports, poundage reports, and more coming soon

Shopping List and Ordering Process
To begin a new order, select Shop on the navigation bar. You will then see the complete list of products available for ordering by your organization. On the list, you will see several different food products available through the SLO Food Bank. The category, storage requirements, packaging and unit information, and nutrition are available to be viewed for each product. An Agency can view only certain types of products by using the Filters feature in the upper right corner of the catalog based on the Price, Category, Storage, or Nutrition designations assigned to each product.

The Category designations include Co-op, Donation, Government Purchase Unrestricted, Produce, and Purchased. Some organizations may also see other program-specific categories such as TEFAP and No Cook Bags based on their prior enrollment in those programs. The Storage designations include Dry, Frozen, and Refrig based on the temperature requirements of the product.
The **Nutrition** designations include *Choose Often*, *Choose Sometimes*, and *Choose Rarely* where the more healthful product is considered *Choose Often*, and the least healthful is considered *Choose Rarely* as determined by the SLO Food Bank’s Nutrition Policy.

The full catalog of products may be toggled by using the three display icons in the upper right-hand corner of the catalog next to the **Filter** selection box based on one’s own preferences:

1. **List Display**: Shows the name, category, storage requirements, packaging description, nutrition category, and price for each product along with a picture if available.
2. **Condensed Display**: Shows only the name, price, and limit for each product.
3. **Tile Display**: Similar information to the List Display, but in a tile format.

**Your Shopping Cart**

To begin the ordering process, add an item to your cart. To add an item to your cart, input the quantity you wish to have in the **Qty** field and then click “Add to Cart.” After starting the order process, you will have one hour to submit the order before your selections expire and you will have to start the ordering process over again. This is to ensure that the product selections you make are up to date and are not unduly preventing other agencies from having access to those products if your order remains unsubmitted.

To view the items in your cart, click the blue “X Item(s)” link next to the cart icon at the very top of the PWW page.

Once you are ready to finalize your order, click the item count link next to the Shopping Cart symbol in the upper right-hand corner to review your shopping cart.

To adjust the quantities of any item in your shopping cart, you may either type in the quantity you wish to have or use the up and down arrows within the **Qty** field. Then
click *Update Cart* to confirm the adjustment. To remove an item from your cart, you must click the red X at the right side of the row.

Once you have reviewed all the items and quantities in your cart or the green *Proceed to Checkout* button at the bottom of the shopping cart list. Both options are indicated by the orange arrows below.

**Checking Out**

The final stage of the ordering process is checkout. To complete your order, please confirm that the information is accurate in the *Pickup Delivery Date* and *Agency Contact* fields.

The *Pickup Delivery Date* should be your pre-assigned pickup and/or delivery day. Please note, if your regular pickup delivery date is not selectable, then you may be ordering outside of your agency’s ordering window. Follow-up with the Partner Services Clerk to confirm that your order was received and able to be processed in time for your scheduled pick-up or delivery. If you do not have a pre-assigned pickup and/or delivery day, please contact the Partner Services Manager.

The Authorized Shopper completing the order should be named in the *Agency Contact*
field so that our warehouse team knows who to follow-up with if there are any questions about your order. The Agency Contact box will be a drop-down of all Contacts listed on the PWW Account, which should already include all the Authorized Shoppers for an organization.

If there are any additional notes, comments, or questions you wish to share with the Warehouse team, please add those to the Delivery Pickup Notes field. This would also be the appropriate place to note who we should expect to be picking up the order if that Authorized Shopper differs from the one that placed the order.

Once your order and pickup/delivery details are complete, click the green Submit Order button. After your order is submitted, you will be taken to the Order History page.

**Reviewing Order Status**

All active orders made by or on behalf of an Agency Partner may be viewed on the Order History page, as shown below. This is also where you can check the status of your recently placed orders, when an order was released, picked, and confirmed, and the scheduled delivery/pickup date and time for a specific order.

The following is a list of the different Status labels for an order:

1. **DataEntry**  
   Products for an order are actively being selected
2. **Entered**  
   The order has been submitted to the Food Bank
3. **Reviewed**  
   The order has been reviewed and accepted by the Food Bank
4. **Released**  
   The order has been released to be compiled and built
5. **Picked**  
   The order has been compiled and built
6. **Confirmed**  
   The order has been picked up by and/or delivered to the Agency Partner

**Statements, Invoices, and Credit Memos**

Through their PWW Account, an Agency Partner may view their invoices and monthly
statements at any time.

To view an account’s invoices, click the **Order History** tab in the green navigation bar as shown below. On this page, you can view the invoices for all completed orders by selecting the **Complete** toggle on the upper left-hand side of the page and selecting **View** next to an order.

![Order History](image1)

To view all monthly statements, invoices, and credit memos for an account, click the **My Documents** tab in the green navigation bar. The **My Documents** page provides access to a complete list of all the financial and compliance documents associated with an account, all of which are available for immediate download.

![My Documents](image2)
In addition, all invoices and monthly statements will be emailed to any contact on an Agency’s PWW Account with the Contact Type of **Order Email**.

**Reviewing Accounts Receivable**

To review any outstanding invoices, go to the **Order History** page and click the **Open AR** tab. According to our records, the invoices displayed here have not yet been paid and are, therefore, outstanding.

**ORDER HISTORY**

<table>
<thead>
<tr>
<th>Order Ref</th>
<th>Balance</th>
<th>Payments</th>
<th>Total Price</th>
<th>Total Service Fees</th>
<th>Misc Charges</th>
<th>Total Grants Product</th>
<th>Total Grant Misc Charges</th>
<th>Total Weight</th>
<th>Total Case Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>View 509054</td>
<td>$82.50</td>
<td>$0.00</td>
<td>$82.50</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>1,668</td>
<td>461</td>
<td></td>
</tr>
<tr>
<td>View 508385</td>
<td>$53.01</td>
<td>$6.84</td>
<td>$59.85</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>706.5</td>
<td>76</td>
<td></td>
</tr>
</tbody>
</table>

To view the credits applied to your account, go to the **My Documents** page and review any documents there with the file name of CreditMemo-CR123456.pdf.

**Payment Procedures**

Account payment is due 30 days from the date the agency statement is issued. Monthly agency statements are automatically generated and distributed via email at the end of each month and can also be viewable at any time on the **My Documents** page. An example of an agency statement can be seen to the right.

Agency Partners are encouraged to make regular payments following the receipt of the monthly statement. The SLO Food Bank accepts payments through the following methods:

- A check from the nonprofit’s bank account
- Money order
- Cash in a designated envelope
For all checks and money orders, please indicate the Agency Reference Code and invoice numbers and/or monthly statement date in the memo line. Payments made without indicating an Agency Reference Code may be accidentally processed as a general donation instead of as an agency payment.

Payments may be left in the Agency Payment Drop Box near the Agency Pick-Up door or mailed to ATTN: Partner Services, SLO Food Bank, 1180 Kendall Rd., San Luis Obispo, CA 93401.

If an Agency fails to make payment on their account balance after 30 days of receiving their monthly statement, the Agency Partner will be notified that their account has an overdue balance. After 60 days, the Agency Partner will only be able to access free product until their existing balance is paid in full. After 90 days, the Agency Partner’s account will be suspended, though they will have the option to appeal the suspension through the Chief Executive Officer.

**Statistics Reporting**

The Statistics tab is where agency partners will submit their monthly reports (formerly quarterly reports). Statistics must be submitted monthly to maintain consistent access to SLO Food Bank products. The statistics submission window for each month opens 7 days before the end of that month and closes at midnight on the 7th day of the next month.

To submit statistics, select the Statistics tab from the navigation bar. As shown below, you can view previous submissions and make new ones. Click the green Add New Agency Statistics button in the right-hand corner to create a new submission.

On the Agency Statistics page, you can view previous submissions and make new ones. Click the green Add New Agency Statistics button in the right-hand corner to create a new submission. A drop-down menu will appear, as shown below, which you will use to
select the month you are reporting for. After a month is selected, click the green Save button to go to the next step.

You will then see the list of questions to fill out for your agency pertaining to the service you provided the community during the month.

Different types of agencies will see slightly different questions based on the nature of food service they provide. If an agency offers multiple types of food service types, they may see a combination of the statistics questions.

Here is a list of the types of statistics each agency is expected to report based on the type of food service program they provide:

<table>
<thead>
<tr>
<th>Pantry</th>
<th>Meal Site</th>
<th>Residential</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Total # of Families/</td>
<td>A) Total # of Families/</td>
<td>A) Total # of Families/</td>
</tr>
<tr>
<td>Households Served</td>
<td>Households Served</td>
<td>Households Served</td>
</tr>
<tr>
<td>B) Total # of People Served</td>
<td>B) Total # of People Served</td>
<td>B) Total # of People Served</td>
</tr>
<tr>
<td>C) Total # of Young Children Served (Age 0-5)</td>
<td>C) Total # of Young Children Served (Age 0-5)</td>
<td>C) Total # of Young Children Served (Age 0-5)</td>
</tr>
<tr>
<td>D) Total # of School-Aged</td>
<td>D) Total # of School-Aged</td>
<td>D) Total # of School-Aged</td>
</tr>
<tr>
<td>Children Served (Age 6-17)</td>
<td>Children Served (Age 6-17)</td>
<td>Children Served (Age 6-17)</td>
</tr>
<tr>
<td>E) Total # of Adults Served (Age 18-59)</td>
<td>E) Total # of Adults Served (Age 18-59)</td>
<td>E) Total # of Adults Served (Age 18-59)</td>
</tr>
<tr>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
</tr>
<tr>
<td>G) # of Days Pantry Open to the Public</td>
<td>I) # of Days Meals Were Served to the Public</td>
<td></td>
</tr>
<tr>
<td>H) # of Days Pantry Open Only</td>
<td>J) # of Days Meals Served Only to</td>
<td></td>
</tr>
<tr>
<td>for Program Participants</td>
<td>Program Participants</td>
<td></td>
</tr>
</tbody>
</table>

You can make edits to the numbers throughout the day that the submission was created.
On the next day, editing will be locked and any corrections will need to be made by either the Partner Services Manager or Community Programs Coordinator.

**Note:** The number of families/households, people, and the age demographics should be unduplicated over the course of the month. For example, if you serve a single family of 5 three times during May, then that family would only count as 1 family/household served and 5 individuals and not as 3 families and 15 individuals.

**Agency Pickup Reporting**

Agency Pickup is the term used by Primarius to describe grocery rescue activities performed by agency partners (Agency Direct Rescue). At the end of each week, you can enter weights of all rescue items collected through your PWW account.

After logging into PWW using your Agency Login Credentials, select the “Agency Pickup” tab from the navigation bar at the top of the page. This will display an Agency Pickup page that includes options for all the donors that you currently collect from:

![Agency Pickup Page](image)

You will select “create pickup” for any of these donors and enter weights of all rescues for each. The spreadsheet included in your Agency Direct Rescue packets will automatically calculate weekly totals from each of your individual pickup entries, and you can enter that weekly total for each of the food categories. For the date of pickup, since we’re totaling all of the weekly weights, you can use the last date of the week you’re entering weights for.

The food categories listed includes a “waste/usable” category. This is where you
would record the weight of food items that has been deemed unusable for food safety reasons upon arrival to your agency. For example, if you received 25 lbs. of prepared foods which was two weeks past its best-by date on the day you received it, you would then record 25 lbs. under the waste category.

After you submit, you will be automatically sent back to your donor options for agency pickups. Repeat the process for all donors you picked up from.

**Note: If you did not receive any donations during a given week, you must still submit a report with a “0” total and a comment noting that no collection was done.** You can submit this “0” total in the first donor on your donor selection page. In the case of the donors in the image above, a “0” total would be entered into the Costco pickup.

Also note that for any totals above 1,000 lbs. you will receive a warning once you submit your pickup that this total exceeds the limit. You will still be able to submit weights over 1,000 lbs.- this warning simply functions to ensure that these entries are correctly entered.
Monthly Statistics FAQ

I’m trying to input my statistics, but the online system is saying there is already an entry for the month. How do I add my missing statistics?
This happens when someone from an organization clicks through the green “+ Add New Agency Statistics” button and selects a month without submitting any actual numbers for that selected month. Primarius will autosave the blank statistics report as “0” for all values, and then automatically lock the submissions at the end of the day that this erroneous submission was made. To correct this issue, please contact either the Partner Services Manager or a Community Programs Coordinator.

How do I update or correct my statistics after submitting them?
You can edit the statistics throughout the day that the submission was created, but that submission is automatically locked at the end of that day. After the original day of submission, any corrections will need to be made by either the Partner Services Manager or a Community Programs Coordinator.

Do I need to include families/household data? Most of our participants are unhoused, single, and/or students.
Yes, please include families/household data even if most of your participants are unhoused, single, and/or students. In most cases for unhoused, single, and/or students, these participants would be counted as 1 family/household with 1 individual.

Do I need to include individual data? Our site only counts participation by household/car.
All programs should do their best to provide individual and household participation data. In the case that your organization only tracks participation by household, please evaluate if there is a way to begin documenting and tracking this information. If this is not possible, please do your best to estimate this individual data and make a note that this information is an estimation in the Comment section.

Do I need to include age demographics? Our site doesn’t track this information.
All programs should do their best to provide the age demographic data for their participants. In the case that your organization does not currently track age demographics, please evaluate if there is a way to begin documenting and tracking this information. If this is not possible, please make a note that this information is not available in the Comment section.
If I don’t provide age demographic information, does that affect my organization’s access to resources?
Unfortunately, yes. Many SLO Food Bank programs and grant-funded foods are restricted based on participants ages. An otherwise qualified Agency Partner that does not include age demographic information may be overlooked when staff distributes program and grant-specific resources to agencies serving a specific age demographic.

How do I count families/households and individuals for those that are using our services multiple times per month?
The number of families/households, people, and the age demographics should be unduplicated over the course of the month. For example, if a family of 5 visited one’s pantry three times during May, then that family would only count as 1 family/household served and 5 individuals rather than as 3 families and 15 individuals.

How do I determine if my pantry and/or meal site is open to the public or only for program participants?
For these purposes, “public” distributions mean that a program is open to a member of the public without any sort of pre-registration or intake process before their arrival at the site, while “only for program participants” distributions are sites closed to the public and require registration or program enrollment before the day of service. For example, a pantry that signs up a new participant at their first visit to the pantry would be a “public” distribution, while a pantry that requires a participant to call ahead and enroll and does not allow someone to receive food at their first visit to the pantry without this pre-enrollment would be a “only to program participants.”

Should I include my days open for both the public and only for program participants?
Generally, you would only provide an answer to one of these questions, with the alternative being “0,” given that most programs are either open to the public or open only to program participants. You would only provide a non-zero answer to both of these questions if your program provides separate public and private services. For example, if your site holds a once-a-month public distribution and weekly home-delivered groceries to enrolled participants, you would report “1” for # of days groceries available to the public and “4” for # of days groceries available only for program participants.

How do I count days open for a home-delivery meal or grocery program?
A program that provides home-delivered food resources, such as meals or groceries, would count themselves as “open” on any day that those resources are delivered to their participants. Given that most of these types of programs require some sort of enrollment process, please add your days open to the “# of days meals/groceries available only for program participants” row.
Our organization also uses and/or hosts other programs from the SLO Food Bank, such as No-Cook Bags, Breakfast Bags, Children’s Farmers’ Market, Senior’s Farmers’ Market, and/or a Neighborhood Food Distribution. Should we count those participants in our Statistics?

Yes! We ask that an Agency Partner include participants for any and all SLO Food Bank programs. Please do your best to not double count participants across the different ways you provide them access to food resources. For example, if you have a participant that received a Breakfast Bag, food from your pantry, and participated in a Children’s Farmers’ Market over the course of the month, that participant should only count as 1 person and not as 3 people. If you have questions on this, please feel free to contact either the Partner Services Manager or a Community Programs Coordinator.
Site Self-Assessment

The items listed below represent the major areas evaluated during a pre-operational and/or annual site visit. This checklist is designed to assist an organization in evaluating their program and facilities to ensure that they are meeting the standards and requirements of the SLO Food Bank and our affiliated organizations. Any unchecked items may be considered a violation during a site visit and should be corrected preemptively.

**Program Integrity**
- ☐ Organization has been determined by the IRS to be a 501(c)(3) Public Charity
- ☐ At least 50% of program clients are needy, ill, or infants
- ☐ Clients receive food at no cost, monetary or otherwise
- ☐ Clients are not asked or required to participate in or attend any religious or political services in exchange for food
- ☐ Clients are not excluded or included based on ethnicity, race, country of origin, citizenship, social status, gender, sexual orientation, or religious affiliation
- ☐ Maintenance of program participation records (rates and age demographics) for 1 year
- ☐ Maintenance of SLO Food Bank invoices for at least 2 years

**General Facilities and Operations**
- ☐ Walls, ceilings, and floors are clean and well-maintained
- ☐ All windows are able to be sealed and closed
- ☐ Plumbing is operational and in good working order (i.e. no leaks or slow-moving drains)
- ☐ Floors under tables and racks are clean and clear of debris
- ☐ All garbage cans are regularly cleaned and have lids
- ☐ Outside garbage receptacles are clean, well-maintained, and not overfilled
- ☐ Cleaning equipment is clean and well-maintained
- ☐ All brooms and mops are stored off the ground
- ☐ Food storage and/or preparation areas have easy access to a restroom
☐ Restrooms are clean, well-maintained, and stocked with soap, running hot water, and single-use towels
☐ Each restroom has a designated trash can
☐ Each restroom has a handwashing sign or poster present instructing employees and volunteers to wash hands before returning to work
☐ Facility is free from signs of rodents, insects, and other pests
☐ Facility is regularly inspected for pests and treated accordingly if evidence found
☐ Smoking is not permitted in food storage or preparation areas

**Food Transportation**
☐ Temperatures of all dairy, prepared, and potentially hazardous foods must remain below 41°F during transportation using active (refrigerated vehicle) or passive (thermal blankets or coolers with cold packs) cooling methods
☐ All frozen foods must remain frozen during transportation
☐ A thermometer must be available in the transportation vehicle to verify temperatures as needed
☐ All hot foods must remain above 135°F during transportation
☐ Vehicles must be maintained in a sanitary condition

**Food Storage Facilities**
☐ Food storage area is secure (locked or limited access)
☐ Food on-site is free of contamination, adulteration, and spoilage
☐ Food is protected from dirt, over-head leakage, and other forms of contamination
☐ All food is stored at least 6” off the ground, including within walk-in freezers and refrigerators
☐ Food storage containers are non-toxic and have fitted covers and labels
☐ All shelving must be clean and free of dirt and food accumulation
☐ The area behind, under, around, and above food storage areas must be clean and free of debris
☐ All hazardous substances (cleaning supplies) are clearly labeled and stored away from food products
☐ No raw meats are stored above ready-to-eat foods or produce
☐ Raw foods are stored separately from cooked foods
☐ All refrigerators and freezers have a thermometer located inside each unit or as an integral part of the unit (i.e. external dial) that is easily read and accurate within 2°F
☐ All refrigerators must maintain an internal temperature of 40°F or lower  All freezers must maintain an internal temperature of 0°F or lower

**Program Specific: Residential Site**

☐ Program coordinator has a current ServSafe® Food Handler Card which is publicly displayed
☐ Food storage and preparation facilities are located separately from all bedrooms and bathrooms
☐ A regular cleaning schedule is in place for all food storage and preparation areas
☐ All dishes and utensils are clean and sanitary and stored in a way to prevent contamination
☐ Food preparation materials, including utensils, are in good condition
☐ All hood and exhaust systems are clean, well-maintained, and free of grease
☐ Personal and communal food is appropriately labeled and segregated
☐ All food preparation surfaces and equipment (stoves, ovens, microwaves, etc.) are clean and free of food debris
☐ Liquid soap and hot water is readily available at the kitchen sink
☐ A clean towel and/or single-use paper towels are available to dry hands

**Program Specific: Basic Food Pantry**

☐ Pantry manager and/or program coordinator has a current ServSafe® Food Handler Card which is publicly displayed
☐ The pantry and/or distribution hours/days are predictable and regular
☐ The pantry may only distribute raw, whole produce and shelf-stable items in the manufacturer’s original packaging
☐ The pantry does not repackage any foods intended for human consumption
☐ Volunteers and employees must be wearing gloves while handling raw produce
Program Specific: Expanded Food Pantry

- Pantry manager and/or program coordinator has a current ServSafe® Food Handler Card which is publicly displayed
- The pantry and/or distribution hours/days are predictable and regular
- The pantry may distribute raw, whole produce, shelf-stable items, prepared foods, and potentially hazardous foods in the manufacturer’s original packaging
- The pantry does not repackage any foods intended for human consumption
- Volunteers and employees must be wearing gloves while handling raw produce and potentially hazardous foods

Program Specific: Limited Meal Site

- Meal site leaders have a current ServSafe® Food Handler Card available for viewing at the meal site
- The meal hours/days are predictable and regular
- All food preparation (cutting, cooking, etc.) are done off-site at an inspected commercial kitchen or come prepared in manufacturer’s original packaging (soup cans, pre-sliced bread, deli meats, etc.)
  - Food assembly and/or reheating is permitted on-site
- Volunteers and employees are wearing gloves while handling and serving food
- Volunteers and employees have hair confined, have no open sores, are not sick, and are wearing clean outer garments
- Tongs, ladles, or other implements are used for handling and serving food products and protected from cross-contamination when not in immediate use
- Serving tables are washed and sanitized before and after the meal service
- Utensils, plates, and bowls are clean and sanitary
- Potentially hazardous foods (including meats, cut vegetables, prepared foods) are maintained below 41°F or above 139°F
- Thermometers are available on-site to verify temperatures of potentially hazardous foods as needed
- All food containers are labeled with contents and date of preparation
Program Specific: Full Meal Site

☐ Meal site leader or kitchen manager has a current ServSafe® Food Protection Manager certificate which is available for viewing at the meal site

☐ Volunteers and employees have current ServSafe® Food Handler Cards on file at the meal site

☐ A current food facility certificate from the SLO County Environmental Health Department must be displayed. In the case that food is prepared off-site in a non-commercial kitchen (e.g. private homes), special permission must be given by SLO County Environmental Health Department

☐ Volunteers and employees must be wearing gloves while preparing or handling food

☐ Volunteers and employees have hair confined, have no open sores, are not sick, and are wearing clean outer garments

☐ The meal hours/days are predictable and regular

☐ All sinks are fully operable with hot and cold water

☐ Grease traps are clean and free from residue

☐ All cooking equipment is clean and well-maintained

☐ All food contact surfaces are washed and sanitized

☐ Tongs, ladles, or other implements are used for handling and serving food products and protected from cross-contamination when not in immediate use

☐ Serving tables are cleaned and sanitized before and after the meal service

☐ Utensils, plates, and bowls are clean and sanitary

☐ Multiservice utensils are cleaned in one of the following means: by hand in a three-compartment sink; a commercial dishwasher, or high temperature sanitation

☐ Potentially hazardous foods (meats, cut vegetables, prepared foods) are below 41°F or above 139°F

☐ Frozen foods are defrosted in the refrigerator, the microwave, or under running water

☐ Thermometers are available on-site to verify temperatures of potentially hazardous foods as needed

☐ All food containers are labeled with contents and date of expiration or preparation
SLO Food Bank-Affiliated Programs

No-Cook Bags for the Homeless
- Organization has a current application on file for no-cook bag distributions
- Distribution is done according to the guidelines of the program and to qualified recipients

Agency Direct Rescue (AKA Grocery Rescue)
- Organization has a participation form on file for grocery rescue activities
- Collections from Feeding America affiliate grocery stores are declared and reported to the SLO Food Bank in a timely manner

Community Food Programs (AKA TEFAP/USDA Distributions)
Partners that host a SLO Food Bank Community Food Program site are subject to a separate inspection by the Community Food Programs team.
## Temperature Log

### Recommended Temperatures

<table>
<thead>
<tr>
<th>Area</th>
<th>Temperature</th>
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<tbody>
<tr>
<td>Dry Storage Area</td>
<td>45 to 75°F</td>
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<tr>
<td>Cooler Storage Area</td>
<td>32 to 40°F</td>
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<tr>
<td>Freezer Storage Area</td>
<td>Below 0°F</td>
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### Unit Log

<table>
<thead>
<tr>
<th>Unit ___</th>
<th>Circle One: Cooler</th>
<th>Freezer</th>
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<tbody>
<tr>
<td>Month/Day/Year</td>
<td>Temperature</td>
<td>Checked By</td>
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<tr>
<th>Ex</th>
<th>Date</th>
<th>City</th>
<th>Number of Individuals in your Household</th>
<th># of People Age 0-5 0-5 Años</th>
<th># of People Age 6-17 6-17 Años</th>
<th># of People Age 18-60 18-60 Años</th>
<th># of People Age 60+ 60+ Años</th>
<th>Is this your first time visiting our pantry since the start of the month? (Y/N) ¿Es la primera vez que visita nuestra despensa desde principios de mes?</th>
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