

**SECTION VI**  
2015 MILWAUKEE COUNTY DEPARTMENT ON AGING  
**HOME DELIVERED MEALS**  
**PROGRAM SPECIFICATIONS**

**Service Delivery Guidelines**

Applicants for Milwaukee County Department on Aging (MCDA) funding to provide Case Management & Delivery Services for the Home Delivered Meal Program (CM/D:HDM) must comply with and incorporate within program operations the following specifications and guidelines.

Where indicated in **bold type**, applicants must include a description of how they will meet specific guidelines in the indicated section(s) of **Exhibit I**, Description of Proposed Programs and Services.

**I. Program Activities**

The intent of the CM/D:HDM is to provide one hot nutritious meal per day to maintain or improve the nutritional status of eligible homebound elders. (Actual meal preparation, packing, and transportation to dispatch sites shall be the responsibility of caterer(s) selected by MCDA. Meal preparation, packaging, and transportation to the dispatch sites shall be “bid” according to the policies and procedures of the Procurement Division of the Milwaukee County Department of Administration. A contract(s) will be awarded to food caterer(s) who meet the standards and specifications according to Milwaukee County procedures and policies).

Provider responsibilities include, but are not limited to the following:

1. Client assessments/reassessments
2. Meal Delivery
3. Routing
4. Driver supervision
5. Case management and service coordination
6. Ordering of meals on a daily basis from caterer(s) designated by MCDA.
7. Monitoring of meals to ensure compliance with specifications and regulations.
8. Coordination of meal distribution at eight dispatch locations Monday through Friday except most Major Holidays.
9. Provision of nutrition education materials to clients minimally one time each quarter, four times annually.

## DISPATCH SITES

◆ Arlington Court	◆ 1633 N. Arlington Place
◆ Beulah Brinton	◆ 2555 S. Bay Street
◆ Clinton Rose Park	◆ 3045 N. Martin Luther King Drive
◆ Franklin	◆ 9222 W. Loomis Road
◆ Salvation Army	◆ 4129 W. Villard Avenue
◆ South Milwaukee	◆ 2424 15 <sup>th</sup> Avenue
◆ Washington Park	◆ 4420 W. Vliet Street
◆ West Milwaukee	◆ 1345 S 47 <sup>th</sup> Street

## 2014 INVENTORY

Arlington Court	5 Hot Boxes	2 Coolers		
Beulah Brinton	18 Hot Boxes	13 Coolers	5 Baskets	
Clinton Rose Park	8 Hot Boxes	9 Coolers		
Franklin	8 Hot Boxes	5 Coolers		
Salvation Army	49 Hot Boxes	46 Coolers	9 Baskets	3 Carts
South Milwaukee	20 Hot Boxes	10 Coolers	3 Baskets	
Washington Park	12 Hot Boxes	6 Coolers	3 Baskets	
West Milwaukee	21 Hot Boxes	19 Coolers		
Goodwill Storage	25 Hot Boxes	27 Coolers	15 Baskets	

**Total Hot Boxes = 166**

**Total Coolers = 137**

## **A. Food Service**

1. Where feasible and appropriate, provider will make arrangements for availability of services in weather related emergencies.
2. The provider will order meals daily from the caterer(s) selected by MCDA. Each client is to receive one complete meal that consists of both “hot” and “cold” portions that together meet one-third of the recommended daily allowance for older adults. Some clients will be eligible for 2 meals per day, one hot meal and one cold bag meal if authorized from a managed care provider based on individual needs. Additionally, there may be clients eligible for cold or frozen weekend meals delivered on Fridays.
3. The provider is required to ensure that hot foods are delivered to client homes at temperatures of not less than 140° and cold foods at no greater than 41°F. Food not required to be served hot or cold must be delivered in such a manner as to be received and consumed in a palatable condition. All foods must be prepared, stored and delivered to the recipients in such a sanitary manner that it is not and cannot become contaminated.
4. The provider shall furnish such services to insure that all equipment is kept clean and sanitary throughout, in accordance with the rules and regulations of the City of Milwaukee Health Department and other regulatory agencies. If licenses or permits become mandatory by law or statute, the Provider is required to keep all in effect.
5. The provider shall monitor quality of meals provided by caterer(s) to ensure adherence to Milwaukee County standards and specifications.
6. The provider shall monitor portion control to ensure that requirements of the Older American’s Act, State of WI and MCDA are met.
7. The provider shall resolve the daily catering problems as they occur, such as food or supply problems, insufficient temperatures, inadequate portions, late delivery of meals, shortages, improper delivery of meals, etc.
8. All receipts records and invoices for meals ordered by the provider shall be made available upon request for review and verification of authenticity by the Milwaukee County Department of Audit and/or MCDA staff.
9. In the event that the caterer(s) fail to deliver any meals or portions of the meals as specified by the MCDA, the provider shall have the authority to procure meals from other caterer(s) selected by MCDA and charge to the original caterer(s) the cost of such replacement meals, plus any expenses incurred by the provider in obtaining such replacements.

10. Meals and menus shall adhere to the specifications developed by MCDA. All meals served must provide a minimum of one-third of the recommended daily allowance for adults. All meals must be prepared in accordance with the menus developed by the Milwaukee County Senior Meal Program Director.
11. The provider shall maintain such records, supported by catering receipts, daily tally sheets, driver logs, computerized records, daily activity reports, etc. as MCDA will need to meet its responsibilities under all Federal and State reporting requirements.
12. The books and records of the provider shall be maintained for a period of four (4) years and shall be available for inspection and audit by representatives of the Department of Public Instruction, USDA, General Accounting Office, MCDA, and Milwaukee County Department of Audit at any reasonable time and place.

## **B. Meal Delivery**

1. It is the provider's responsibility to design an efficient and timely routing system to ensure the delivery of food which meets the temperature standards as specified in Section 1.A (3) above.
2. Under normal circumstances, no routes are to take longer than one hour and thirty minutes to complete.
3. It is the provider's responsibility to recruit, train, supervise, and provide for an adequate number of drivers and backup drivers to operate the CM/D:HDM.
4. It is the provider's responsibility to provide ongoing training for drivers as specified in Section 1.A (8).
5. Daily delivery logs must be maintained which include client names and date of delivery.
6. While on duty all drivers must wear identification badges containing at least the following information: first name, title, agency name or logo.
7. All meals must be delivered in accordance with procedures established by the City of Milwaukee Health Department and MCDA.
8. It is the provider's responsibility to ensure that all hot foods are protected from heat loss by being transported in an NSF approved "hot box" that will maintain temperatures of a minimum of 140°F for one hour and thirty minutes. Equipment will be furnished by MCDA or service provider.
9. To protect cold foods from becoming warm, it is the provider's responsibility to transport cold foods in such equipment that a temperature no greater than 41°F is maintained. Equipment will be furnished by MCDA or service provider.

10. As detailed in sections B (8) and (9) above, all meals and portions of the meals must be transported in equipment approved by MCDA and in enclosed vehicles. Meals cannot be transported in open-bed trucks or similar vehicles.
11. **It is the provider's responsibility to ensure that each home delivered meal driver has daily personal contact with each client. All meals must be hand-delivered to each client.** Meals may not be left with a relative living in the home nor left unattended at the client's home nor placed in a mailbox, nor left with a neighbor.
12. It is the provider's responsibility to coordinate activities at the dispatch sites; to allocate meals to individual "hot boxes"; to clean and maintain in a sanitary condition the equipment used in the Home Delivered Meal program.
13. Under other special circumstances, provider may be required to provide delivery of meals or other products for the safety and well being of the home delivered meal clients.

### **C. Case Management and Service Coordination**

1. All referrals for meals shall come from MCDA-Aging Resource Center or directly through a Family Care or I.R.I.S authorization.
2. Some persons may be referred for ongoing case management to MCDA case managers.
3. The case plan format must be approved by MCDA.
4. Client records must contain documentation of need for and coordination of home delivered meals with other MCDA and aging network programs and services.
5. Provider, with the consent of the HDM client or his/her representative will bring to the attention of appropriate officials, conditions that place the older HDM recipient in danger.

### **D. Client Records**

Each client's file must contain:

1. Initial inquiry/request sheet.
2. In-home assessment record.
3. Physician's statement for Medical Certification.
4. File notes following assessment to contain:

- a. Client-stated disabilities;
  - b. Observation of physical mobility, speech and vision;
  - c. Observation of mental awareness, competence and ability to function;
  - d. Observation of home environment, i.e., necessities, odors, conveniences;
  - e. Summarization of person(s) or agency responsible for home and personal care, i.e., bathing, cleaning, laundry and shopping
5. All correspondence.
  6. Reassessment data.
  7. Narrative and progress notes.
  8. Plan of care to include:
    - a. Goals of service
    - b. Duration of service
    - c. Frequency of service
  9. Termination notice and reason for termination.

## **E. Client Assessment and Reassessments**

1. To determine the need for service for individuals who are referred by MCDA for home delivered meals; provider will use the client assessment format prescribed by MCDA including the screening for ADLs and IADLs.
2. In-home reassessments of all HDM clients must be conducted by the CM/D:HDM staff **at least annually**. Reassessments are to be conducted more often if a need is indicated. In some cases, MCDA case managers may be asked to conduct a client's reassessment.

## **II. Program Goals and Objectives**

Applicants must specify the **measurable program objectives and outcomes**, and the **methods** and **time frame** to achieve them. The objectives should relate to the proposed program and services. The methods must specify the operational or quantitative steps to accomplish the objectives and measure the outcomes. The time frame should indicate when the objectives would be completed. Also, the nutritional effectiveness of the home delivered meal program must be measured as an outcome. **Fifty clients that are new or have not been on the program for at least a year must have their nutritional status assessed within their first or second month of receiving home delivered meals, and then reassessed after 6 months later.** A complete report detailing methods, data collected and results must be compiled and submitted to MCDA by the end of 2015. **(Include in Section 2.0 of Exhibit 1.)**

## **III. Unacceptable Program Activities**

Activities that violate the provisions of a Department on Aging contract of these Program/Service Guidelines.

#### **IV. Eligible Clients**

- A.** All clients must be in need of home delivered meal service and meet the following criteria established by MCDA.
1. A person must be 60 years of age or older or be the spouse of a person at least 60 years of age who receives home delivered meals.
  2. A person with disabilities, regardless of age, who resides in the same house with an eligible person 60 years or older that is receiving meals may also receive meals.
  3. The individual must be homebound, i.e., does not leave his or her home under normal circumstances.
  4. The person must be unable to participate in the congregate meal program because of physical or mental impairment.
  5. There is no other adult living in the same house, building or area able or willing to prepare meals. When there is another adult living in the same house, meals may be provided as respite, when appropriate.
  6. The program is able to provide a general diet or special diets: Doctor's prescriptions and authorizations are needed for both general or special diet orders.
  7. The individual is able to feed him/herself or have someone available to help feed the individual.
  8. The individual agrees to be home when meals are delivered, or to notify the program to cancel a meal when absence is unavoidable.
  9. The individual must have physical or mental impairment and is unable to obtain and prepare adequate meals.
- B.** Priority must be given to older persons who have greatest economic and social need as defined by the Wisconsin Bureau on Aging which defines these terms as follows: "the term 'greatest economic need' means the need resulting from an income level at or below the poverty threshold established by the Bureau of the Census. The term 'greatest social need' means the need caused by non-economic factors which include physical and mental disabilities, language barriers, cultural or social isolation including that caused by social or ethnic status which restricts an individual's ability to perform normal daily tasks or which threaten his or her capacity to live independently.
- C.** All clients receiving home delivered meals as of December 31, 2014 shall continue to receive service unless discontinued in accordance with Section 5.b of this document.

- D. A complete listing of the names and addresses of active and or terminated clients must be provided to the Department on Aging upon request, in addition monthly meal counts of individual meals may be requested.

## **V. Initiation and Termination of Service**

### **A. Initiation**

1. All referrals for Home Delivered Meals shall come from MCDA-Resource Center.
2. Services will be initiated when an in-home assessment conducted by CM/D:HDM staff indicates that home delivered meal service is necessary and appropriate; a diet has been approved by the physician; and funds are available to provide the service. When a primary M.D. is not available for a diet order; diet requests should be emailed to the MCDA Senior Meal Program Director for permission to provide home delivered meals. Client is responsible for signing a waiver indicating they are taking responsibility for chosen diet.
3. In the event meal service was started as a result of a hospital discharge, etc., an in-home assessment of each new client must be conducted within five working days after meal service has begun.

### **B. Termination**

Home delivered meal services will not be provided and will be terminated when:

1. The client withdraws the request.
2. A referral has been made to and accepted by another resource.
3. It has been determined by assessment or medical reference that the service is no longer appropriate or necessary.

## **VI. Limitation on the Provision of Service**

- A** Each client is to receive one hot meal delivered on a daily basis, Monday through Friday, except for holidays such as Fourth of July, Memorial Day, Labor Day, etc. Shelf-stable, cold or frozen meals may be provided for days the program does not deliver, such as holidays, etc., and is generally delivered with the hot meal that is delivered the day before.
- B** If appropriate and it is determined by CM/D:HDM staff that providing meals seven days per week is in the best interest of those clients with the greatest economic and social need, in order to maintain the health and general nutritional status of those clients, and funds are available, week-end meals may be provided. These meals may be shelf-stable or chilled meals, (not frozen) depending on the client's functional abilities and the program's scheduling and funding abilities and goals.
- C** CM/D:HDM staff shall determine the duration and level of service for each client.

## **VII. Program Personnel**

### **A. General**

1. Applicants must submit a staffing plan, including the job description for each position receiving full or partial MCDA funds involved in this program. **(Include as Appendix 1 of Exhibit 1)**
2. Recognition will be given to those programs that will employ older adults age 45 or over in the provision of services.
3. Personnel funded wholly or in part by MCDA must spend a percentage of their time on contract related activities equal to the percentage of their compensation paid with MCDA funds.
4. All current employees working in the Home Delivered Meal Program and all new potential employees for the Home Delivered Meal Program must be screened with both a local and a statewide criminal check. Employment must be denied and/or an employee terminated if the criminal screenings reveal an unfavorable report that could negatively impact the safety and well being of the clients being served.
5. The appropriate administrative supervisor must supervise all drivers.
6. Supervision of the CM/D:HDM professional and clerical staff must be provided within the structure of the Agency. **(Applicants must detail this structure)**
7. Dispatch Supervisors must be trained annually in food safety and sanitation as required by the State of WI, or equivalent as approved by MCDA.

### **B. Case Management/Service Coordination Personnel**

Case management personnel must meet the following educational requirements and work -related experience:

1. A minimum of a bachelor's degree in social work, dietetics or nursing from an accredited college or university and preferably one year of experience working with older adults in either a paid or voluntary capacity. One Dietetic Technician in the pool of staff is acceptable.

## **VIII. Training**

- A. Applicants must clearly indicate how persons delivering meals will receive training in the following areas:
  1. Awareness of the special needs of older adults
  2. Maintenance of accurate records of service provided
  3. Defensive driving
  4. Accessing emergency medical systems

- B. As part of ongoing training, all program personnel must participate in regular staff meetings to keep informed of overall program activities and developments. Personnel must receive on-going training regarding food safety, sanitation, basic nutrition fundamentals and health & wellness topics related to aging.
- C. In-service trainings need to be supported with documentation containing the following information: date, time, duration, topic and presenter, along with names of attendees.

## **IX. Program Organization**

- A. In **Appendix 8 of Exhibit 1**, applicants must clearly show the lines of responsibility within the program and/or agency who will be:
  - 1. Solely responsible for overall administration of the program;
  - 2. Authorized to sign for the agency and the program;
  - 3. Authorized to receive checks for the program;
  - 4. Responsible for fiscal and budgetary matters;
  - 5. Responsible for reporting monthly data on required forms
  - 6. Responsible for internal monitoring of the program;
  - 7. Responsible for handling consumer and client complaint
  - 8. Responsible for collection, tabulation, recording and depositing of client contributions.
  - 9. Responsible for provision and data entry of Nutrition Education information provided to clients minimally four times a year into SAMS.

## **X. Other Program Requirements**

Applicants must clearly describe their emergency plan for maintaining the provision of services to older adults through this program in the event of an emergency.

## **XI. Alternate Sources of Reimbursements**

- A. Applicants must clearly show how they will determine whether each client is eligible for alternate sources of service. Sources to be investigated may include private resources, Managed Care, etc.
- B. Title III-C of the Older American Act shall be the payment of last resort for reimbursement of services provided to clients. Other resources listed above shall be explored by the agency prior to billing Title III.

## **XII. Billing and Reporting**

- A. On a daily basis, provider will prepare a Meal Summary Report, which shows the number of meals ordered from each caterer, by route and by diet, be it regular or therapeutic. These reports may be requested weekly by MCDA and will be the

“source documents” from which catering invoices are paid by MCDA and from which monthly service reports are compiled. In addition, monthly service reports and client service reports are also required. Family Care meals reporting on a daily and monthly basis is also required. The total number of meals received per individual for all clients must be entered into SAMS at the end of each month.

- B.** At the end of each month, the provider may be requested to submit a list of the names of all clients who received home delivered meals during the month that were paid for with MCDA funding. The list will indicate new clients served during the month as well as the names and status of clients who received service during the previous month, but who did not receive service on the month being reported (i.e. deceased, nursing home, etc.). This list may be requested by MCDA along with the service reports by the fifth (5) working day of each month.
- C.** This program will be funded as a Grant Contract where the provider is reimbursed only for the actual expenses incurred in operating the program and providing the services for which the contract has been awarded.
- D.** Providers must submit to the MCDA a monthly invoice for services provided along with the Service Report and any other reports required by MCDA by the fifth working day of the following month. The monthly invoice for services needs to have original documentation for all reported expenses to be kept on file with the agency. This includes but is not limited to payroll records detailing hours worked, compensation, fringe benefits, etc., paid invoices, and detail of any and all “indirect” or “administrative” costs. The MCDA Senior Meal Program Director will have a right to inspect these documents at any reasonable time. Separate detailed budgets must be submitted to show the revenues and expenditures relating to the operation of the home delivered meals and the congregate meal sites.
- E.** Each quarter, nutrition education units of service for each client, must be entered into SAMS’s. Annual minimum requirement for each client is one unit of service per quarter, or four units per year.

### **XIII. Contributions**

**(Include in Section 2.0 in Exhibit 1)**

- A.** Applicants agree to provide persons receiving services under this agreement, with the exception of those clients whose meals are reimbursed by Managed Care, the opportunity to contribute to all or part of the costs of the services provided in accordance with the established contribution policies for the CM/D:HDM. Collection and banking of contributions shall be in accordance with policies established by Milwaukee County.
- B.** If applicant agency uses a letter to generate contributions, a copy of that letter is to be attached in the proposal as **Appendix 7**.
- C.** Contributions are to be collected in envelopes and deposited in locked boxes located at each dispatch site. Administrative staff of the provider must collect these

envelopes no less than once a week and more often if the need arises. The contents of the envelopes must be counted and/or tabulated and recorded together by two persons designated by the provider. All client contributions, including those mailed to the agency, must be clearly recorded and deposited in a bank account designated by MCDA, no less than weekly and more often if needed. Once counted, a Bonded Courier Service must be utilized for transporting these contributions to a designated bank branch.

- D. Under absolutely no circumstances shall drivers either solicit or accept gratuities or “tips”.

#### **XIV. Criteria for Selection of Agencies**

Agencies wishing to be considered as applicants for MCDA funding to operate the MCDA CM/D:HDM program in 2015 must meet the following criteria:

- A. To be eligible to provide services under this program, an applicant must be legally incorporated under the laws of the state of Wisconsin and have as its primary purpose or business, the provision of services to older persons.
- B. Applicant agencies must have an established track record of providing quality services to Milwaukee County residents. Preference will be given to applicants with an established track record of providing CM/D:HDM activities to Milwaukee County older adults.
- C. Applicants must have the capacity to provide for all the program activities included in the CM/D:HDM specifications. Applicants who intend to subcontract for any of the listed program activities must declare their intent to do so in their application and must receive express approval from MCDA before entering into contractual agreements for such purposes.
- D. For the 2015 calendar year applicants must have the capacity to provide and deliver a minimum of 1,000 meals on a daily basis (Monday through Friday) to qualify as a CM/D:HDM provider.
- E. Applicants must conform with all policies, specifications, and regulations relating to the operation of the CM/D:HDM as determined by MCDA.
- F. Should an applicant be chosen to provide CM/D:HDM, these guidelines shall be incorporated by reference in any contract between the applicant and Milwaukee County, and shall serve as requirements for the provision of services under such contract.
- G. Program Managers of applicants must have access to a fax machine, computer hardware, printers and software programs such as Microsoft Excel and Word; and must have the capability to receive and submit communications and reports via e-Mail with MCDA and the caterer.

## **XV. Review and Inspection**

- A. The activities of the dispatch areas, which are coordinated by the provider, may be inspected at any time during normal business hours by appropriate staff from MCDA. These inspections will be unannounced.
  
- B. All provider's records, that relate to this program, may be inspected during normal business hours by appropriate staff from MCDA. These visits will be scheduled to accommodate both the provider and the Department.

## **XVI. Contract Extension**

A contract for Case Management & Delivery Services for the Home Delivered Meal Program will be awarded for the period of January 1, 2015 to December 31, 2015. Should the program be eligible for Administrative Renewal, any contract extension will be contingent upon satisfactory performance of the service provider, the willingness of the provider to extend the contract, the inclusion of sufficient funding in the Adopted County Budget for the year the contract is extended, and authorization by the Milwaukee County Board of Supervisors.

## **XVII. Insurance**

Applicants must maintain minimum insurance coverage determined by the Milwaukee County Risk Manager in the following areas:

1. General liability
2. Automobile liability
3. Worker's compensation, including a waiver of subrogation
4. Employee dishonesty
5. Milwaukee County listed as an additional insured

The Department on Aging will not award a contract unless the applicant secures adequate coverage, as defined by County, and provides certificate(s) of insurance that include all items listed above.