



**AREA AGENCY ON AGING
SENIOR NUTRITION PROGRAM**

**BEST PRACTICES
FOR
DONATION COLLECTION AND TRACKING**

AUGUST 2004

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CONTRACT LANGUAGE

All providers must follow the donation collection process outlined in their contracts with Dane County. The contract language is as follows (Note: This language is included in Schedule A):

As required by the Older Americans Act and the Wisconsin Bureau on Aging, the PROVIDER shall collect nutrition donations from persons who participate in the nutrition program. Persons age 60 and over are not obligated to make a contribution and shall not be required to do so. However, persons age 60 and over should be encouraged to contribute what they can reasonably afford to help defray the cost of the meal. Efforts may be made to increase the average donations, but such efforts should be positive in nature and should not discourage the participation of individuals who are unable to increase the amount of their donation.

All donations collected are the property of the COUNTY and shall be submitted monthly to the COUNTY. Per Wisconsin Bureau on Aging requirements, collected donations shall be counted daily by two persons, both of whom should sign daily a register verifying the amount collected. The full amount of the collected donations shall be deposited in a bank or savings institution daily in an account designated for nutrition donations only. The deposited donations should be forwarded to the COUNTY monthly.

The remaining sections in this document contain suggestions on how to best implement the processes outlined in the contract language above.

DONATION COLLECTIONS

- ➔ According to contract language (Schedule A), all providers are required to collect Senior Nutrition Program meal donations. Donations can be collected via three methods, on-site collection, mail-in donations, and home-delivery collection. Providers are not required to collect donations through all three methods; however, all sites that serve a meal should collect on-site donations and all sites that offer home-delivery service should collect donations through the mail.

The best practices for each collection method are summarized below.

ON-SITE

- On-site donations should be collected in a locked donation box made of a non-transparent material. The box should be located in an easily accessible location such as near the meal site entrance or near the dining area.
- ➔ • According to policy (*The Wisconsin Elderly Nutrition Program Policies and Procedures*, Section 3.23 Contribution Signs and Brochures), the Dane County Department of Human Services Senior Nutrition Program sign must be posted at all nutrition sites. The sign should be visibly posted near the donation box.
- To help nutrition program staff convey meal costs to ineligible participants, a separate ineligible participant sign should be posted near the donation box or meal sign-in area (Note: Copies of the sign are enclosed for each meal site). This sign indicates that ineligible individuals are required to pay the total cost of a meal. This payment should be made to the meal coordinator.

MAIL

- All congregate and home-delivered meal participants should have the option to mail a monthly donation.
- Participants receiving home-delivered meals should be sent an initial welcome letter as well as a monthly letter reminding them to contribute towards their meals. Please see **Attachment A** for sample letters (Note: The attached letters are samples. Providers with similar letters can continue to use their existing letters).

HOME-DELIVERY

- Meal deliverers should log all donations when they are received and store donations in a locked bank bag while transporting them to the provider.
- ➔ According to policy (*The Wisconsin Elderly Nutrition Program Policies and Procedures*, Section 5.1 Congregate Nutrition Program Eligibility), all individuals receiving a meal who are ineligible for the Senior Nutrition Program (e.g., individuals under age 60 who are not volunteers) must pay the full price of the meal. The meal coordinator at the nutrition site should collect this payment. Please see **Attachment B, Eligibility and Ineligibility for Nutrition Services Incentive Program (NSIP)** (formerly U.S. Department of Agriculture), and **Attachment C, Dane County Nutrition Staff and Volunteers Meal Policy**, for information on participant, staff, and volunteer eligibility and contributions.

DONATION TRACKING

COUNTING AND DEPOSITING DONATIONS

➔ According to contract language (Schedule A), all congregate meal and home-delivered meal donations must be counted by two individuals and deposited in a financial institution on a daily basis. Donations received at the nutrition program site should be counted after the meal when most participants have left. The following process should be followed when counting donations:

1. After the meal, two individuals count the daily donations. These individuals should count the donations together to ensure accurate reporting (i.e., one individual counts the donations and the other observes and then immediately recounts the donations to verify the same total). The individuals counting donations should be Senior Nutrition Program staff members, however, locations with few staff can select a participant or volunteer as one of the two individuals who counts and verifies donation amounts.

2. Once donations are counted, these individuals should complete a daily donation tracking form that contains the following information:

- Total Congregate Meal Donations
- Total Home-Delivered Meal Donations
- Total Donations
- Signatures of both individuals who counted the donations (signatures are a contractual requirement, Schedule A)

➔ Please see **Attachment D** for a sample daily donation tracking form (Note: The attached form is a sample. Providers with similar forms can continue to use their existing forms if they capture the necessary data).

➔ 3. According to contract language (Schedule A), after donations are counted, they must be deposited in a financial institution. If necessary, donations may be stored in a locked safe until the end of the day before they are transported and deposited in a financial institution. Contract language (Schedule A) requires that nutrition program donations be deposited in a separate financial account.

➔ In addition to following the process outlined above, providers should maintain a monthly register of the amount of daily donations and the number of meal participants. This register can be updated on a daily, weekly, or monthly basis and should be reconciled with the financial institution's account statement each month. The monthly register should contain the following information:

- Total Number of Congregate Meal Participants per day
- Total Number of Ineligible Congregate Meal Participants per day
- Total Amount of Congregate Meal Donations per day
- Total Number of Home-Delivered Meal Participants per day
- Total Number of Ineligible Home-Delivered Meal Participants per day
- Total Amount of Home-Delivered Meal Donations per day
- Total Community Options Program (COP) Payments Received per day
- Total Community Living Alliance (CLA) Payments Received per day
- Total ElderCare Payments Received per day

Please see **Attachment E** for a sample register (Note: The attached register is a sample. Providers with similar registers can continue to use their existing forms if they capture the necessary data). This register can be maintained either manually with a hard-copy form or electronically with a spreadsheet.

Providers that are required to follow financial guidelines outlined by their city, town, or village governance should also follow the guidelines set forth in the nutrition donation contract language. Therefore, if under city ordinance all funds must be deposited to a city finance officer, this individual should follow the nutrition donation contract language. This officer must work with the nutrition site to follow contractual guidelines including making daily nutrition donation deposits in a separate bank account. Any deviations to the guidelines must be noted in Special Features or Schedule A of a provider's contract with the County.

TRANSPORTING DONATIONS

Donations should be transported to financial institutions in a locked bank bag. The bag should contain the daily nutrition program donations and a completed deposit slip. When drivers collect donations for home-delivered meals, the donations should be stored in a locked bank bag until they are returned to the meal site or to the program's administrative offices. Providers that do not have locked bank bags may want to ask their financial institution to provide a bag.

FORWARDING DONATIONS

➔ According to contract language (Schedule A), all meal donations must be forwarded to the County on a monthly basis. If possible, the full dollar amount of the financial account should be forwarded. If a minimum balance is necessary to maintain the account, an amount less this balance should be forwarded. A provider's contract with the County should note circumstances that prohibit it from forwarding the full amount of meal donations.

ELDERCARE, COMMUNITY LIVING ALLIANCE (CLA), AND COMMUNITY OPTIONS PROGRAM (COP) DONATIONS

All meal payments from ElderCare, CLA, COP, or other agencies that pay the full cost of participants' meals should be deposited with other nutrition donations. These payments should be tracked separately on the monthly register and included with the monthly nutrition donation amount forwarded to the County. Questions regarding ElderCare, CLA, or COP program participation should be directed to Dane County Department of Human Services Program Managers.

HANDLING CASH

➔ According to contract language (Section B, XXIII. Financial Provisions) all staff handling cash payments are required to be bonded (Note: Providers should contact their insurance providers if they have questions about bonding).

DONATION POLICIES

Each provider should have a basic written policy that outlines how donations are collected and which individuals are responsible for handling, counting, and tracking donations. This policy should be available at the nutrition program site. All staff involved with the Senior Nutrition Program should be familiar with this policy.

PARTICIPANT SIGN-IN PROCESS

When participants arrive at the meal site, they should sign-in. The sign-in process should either have individuals sign their name or, if the site prepares a list of expected attendees based on reservations, mark an “X” next to their name. The sign-in sheet should capture the following information:

- **Participant’s Name** – Completed by staff or volunteers making meal reservations
- **Special Meal Requests** – Completed by staff or volunteers making meal reservations
- **Ineligibility Indicator** – Completed by staff to indicate that a participant was ineligible for meal
- **COP/CLA/ElderCare Indicator** – Completed by staff to indicate that a meal is reimbursable by COP, CLA, or ElderCare
- **Participant’s Name** – Completed by participants when they sign-in for their meal
- **Under Age 60 Indicator** – Completed by participants when they sign-in for their meal

Please see *Attachment F* for a sample sign-in sheet (Note: The attached sheet is a sample. Providers with sign-in sheets can continue to use their existing sheets if they capture the necessary data). A similar sheet should be used to track the reservations and eligibility of home-delivered meal participants. This sheet should not contain a Participant Sign-In column.

Each provider should be prepared to verify the eligibility of its participants during program audits. During these audits completed registration forms may be requested for a sample of participants on a daily sign-in sheet. All participants, including ineligible participants, who sign-in and receive a meal must have a completed registration form on file (policy forthcoming).



ATTACHMENT A – SAMPLE LETTERS

Note: This is a sample reminder letter for providers who *do not* track the total monthly cost (number of meals multiplied by actual cost of meal) of home-delivered meals for each participant.

Dear Home Delivered Meal Participant:

Hello! We are pleased to provide home delivered meals for you and hope that the meals are meeting your nutritional needs.

Some people don't realize it, but participant donations are one of the main sources of funding for this program. The current cost of each meal to Dane County is \$5.30 per meal. This cost includes making meal arrangements, the food and preparation of the food, the packaging materials, and arranging for and actual delivery of the meals.

People over the age of 60 can make a donation toward the cost of the meals based on what they feel they can afford. Contributions from participants are a **vital** part of the program. Please contribute as much as you can toward the cost of the meals.

The ways that you can make your contribution are as follows:

If you find it difficult to pay for your meals, please contact one of our staff who will assist you in finding a financial program that may help.

Please call _____ if you have questions or if you need to cancel your meal delivery for some reason (_____ hours advance notice please).

IF FOR ANY REASON YOU ARE UNABLE
TO BE AT HOME WHEN YOUR MEAL IS
DELIVERED, PLEASE CALL _____.
MEALS CANNOT BE LEFT IF NO ONE IS HOME.

Senior Dining



Fellowship, Food ♥ Fun



ATTACHMENT A – SAMPLE LETTERS

Note: This is a sample reminder letter for providers who *do* track the total monthly cost (number of meals multiplied by actual cost of meal) of home-delivered meals for each participant.

Date

Dear Home Delivered Meal Participant:

Hello! We are pleased to provide home delivered meals for you and hope that the meals are meeting your nutritional needs.

Some people don't realize it, but participant donations are one of the main sources of funding for this program. The current cost of each meal to Dane County is \$5.30 per meal. This cost includes making meal arrangements, the food and preparation of the food, the packaging materials, and arranging for and actual delivery of the meals.

People over the age of 60 can make a donation for the meals based on what they feel they can afford. Contributions from participants are a **vital** part of the program.

In the month of _____ you received ____ meals at a cost of _____. Please contribute what you can towards the cost of the meals.

The ways that you can make your contribution are as follows:

If you find it difficult to contribute towards your meals, please contact one of our staff who will assist you in finding a financial program that may help.

Please call _____ if you have questions or if you need to cancel your meal delivery for some reason (_____ hours advance notice please).

Senior Dining



ATTACHMENT A – SAMPLE LETTERS

Welcome to _____ Area - **Home Delivered Meals Program**
Telephone # _____

Who is eligible? Anyone who is age 60 and over is welcome to eat at our Senior Dining Center. For Home Delivered Meals, however, there are a few criteria which you must meet. You need to be at least 60 years of age. You also need to be homebound, meaning that you mostly get out for medical appointments and that when you do leave the house, you probably need assistance to do so. You must be unable to prepare your meals and have nobody who is willing or able to assist you.

Our meals must be able to meet your dietary requirements and you must be able to eat safely on your own. A representative from our organization will visit you and talk with you about your need for home delivered meals, as well as answer any questions. Periodically we will review your situation to ensure your continued eligibility, to see how the meals are working, and to offer other assistance if needed.

How does the program work? Your meal will be delivered from _____ (Site) _____ between ____ (Time) _____. If you will not be able to be home when your meal is to be delivered, please call as early as possible to cancel your meal. Please call one business day ahead before noon to cancel your meal. If an emergency occurs, please call immediately or leave a note on your door. **If you have not cancelled your meal and you do not answer the door, we will assume that you are in need of help and we will begin an emergency check procedure.**

We cannot leave meals for you unrefrigerated. Please refrigerate unused food immediately and dispose of leftovers if uneaten after two days.

What kinds of meals are these? Our meals will meet 1/3 of your Recommended Dietary Allowance for the day. Our meals are prepared with **No Added Salt**, the reason being that many of the people who eat our meals need to be careful of their salt intake. We can also provide a **Diabetic** meal, which basically substitutes high-sugar content items with suitable low-sugar alternatives.

How do I pay for these meals? Some people don't realize it, but participant contributions are one of the main sources of funding for this program. The current cost of each meal to Dane County is \$5.30 per meal. This cost includes making meal arrangements, the food and preparation of the food, the packaging materials, and arranging for and actual delivery of the meals. People over the age of 60 can make a donation for their meals based on what they feel they can afford. Contributions from participants are a **vital** part of the program. Please contribute as much as you can toward the cost of the meals.

This is how you can make your contributions:<Insert site-specific text>

Senior Dining



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ATTACHMENT B – NUTRITION SERVICES INCENTIVE PROGRAM (NSIP) ELIGIBILITY REQUIREMENTS

Eligibility and Ineligibility for Nutrition Services Incentive Program (NSIP) (Formerly
US Department of Agriculture)
(Meals provided are either eligible or ineligible)

Congregate Eligible

- Any individual age 60 and older
- Congregate Participant over the age of 60 and the spouse of the person regardless of age
- A person with a disability, under age 60 who resides in housing facilities occupied primarily by older individuals at which congregate nutrition services are provided
- A disabled individual who resides at home with and accompanies an older individual to the site
- Any nutrition services staff over the age of 60
- Volunteers under or over age 60

Congregate Ineligible

- Participants under the age of 60
- Participants under the age of 60 with a waiver from the AAA to have a meal on a contribution basis
- Staff who are under the age of 60
- Individuals (of any age) whose meals are fully reimbursed by a program such as COP, ElderCare, CLA, etc.

Home Delivered Meal Eligibility

- Any individual age 60 and over who is frail and essentially homebound by reason of illness, disability, or isolation
- A spouse of a person eligible for a HDM as described above, regardless of age or condition, if an assessment concludes that it is in the best interest of the homebound older individual
- An individual with a disability who resides at home with older individuals if an assessment concludes that it is in the best interest of the homebound older individual
- Non-elderly individuals with disabilities who reside at home with older individuals are eligible to receive home delivered meals on a contribution basis

Home Delivered Meal Ineligibility

- Individuals under the age of 60 who do not fit into above categories
- Individuals under age 60 who have a waiver from the AAA to receive HDM's on a contribution basis
- Individuals of any age whose meals are fully reimbursed by a program such as COP, ElderCare, or CLA

Note: This information is compiled from: The Wisconsin Elderly Nutrition Program Manual – Last revisions dated 7/97 and Draft Policy Manual: Nutrition Program Operations Chapter – This is a draft dated May, 2002.

ATTACHMENT C – STAFF AND VOLUNTEER MEAL POLICY



For Approval – Board of Directors – June 2004 DANE COUNTY NUTRITION STAFF AND VOLUNTEERS MEAL POLICY

This draft of the policy has been developed by staff, reviewed by the focal points and approved by the Nutrition Committee.

This policy applies to all volunteers and staff who work for the Dane County Senior Dining Program meal sites and programs that operate through contracts with the Area Agency on Aging of Dane County, DCDHS. It does not apply to other meal programs for seniors that are volunteer provided or privately provided on a fee basis.

Volunteer Meal Policy: All people, regardless of age, who volunteer to work with the senior dining program sites during the lunch hours, may be offered meals on a donation basis. It is assumed that volunteers have donated through their hours of work although they are welcome to contribute to the Senior Dining Fund. Every site will provide a procedure that assures the privacy of all donations, including those made by volunteers.

Meals Eaten by Paid Staff Who Work at Focal Points: Site managers (regardless of age) who work during meal hours may eat meals as part of their job of evaluating quality of the food. Donations are welcome, but are not required. Other staff at the agencies that operate the meal sites that are over 60 years of age may also reserve meals and pay for them on a donation basis just as would be true for any person that age.

However, all other senior center or coalition staff (those less than 60 years of age) must pay for the cost of the meal as designated by the Area Agency on Aging of Dane County for that year unless they are required to attend the program as part of their jobs in which case they may pay the average cost of the food itself, which in 2004 is **\$3.50/meal**. The actual price of providing a meal in 2004 at a congregate site is **\$5.30/meal**.

In addition, all other guests at the site, or employees of other agencies located near the site must pay for the full price of providing a meal (2004= **\$5.30**). This includes Area Agency on Aging of Dane County and other visiting staff on county business who are under the age of sixty with the exception of the designated county nutritionist. Of course, focal point agencies may elect to fund guests' meals with other, non-public funds.

ATTACHMENT D – DAILY DONATIONS TRACKING FORM

Senior Nutrition Program Daily Donations Tracking Form

Site: _____

Date: _____

Total Congregate Donations: _____

Total Home-Delivered Donations: _____

Total Donations: _____

Signature 1: _____

Signature 2: _____

ATTACHMENT E – DONATION SUMMARY

Senior Nutrition Program Donation Summary

Site: _____

Month: _____

Date	Total Cong Meals	Inelig Cong Meals	Cong Meal Dntns	Total HDM Meals	Inelig HDM Meals	HDM Meal Dntns	COP Pymts	CLA Pymts	Elder Care Pymts
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
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22									
23									
24									
25									
26									
27									
28									
29									
30									
31									

Total Eligible Meals:

Cong=

HDM=

Total Ineligible Meals:

Cong=

HDM=

Note: The electronic version of the form was developed in Excel. In Excel formulas are used to calculate the totals at the bottom of the sheet.

ATTACHMENT F – SIGN-IN SHEET

Senior Nutrition Program Daily Sign-In Sheet

Day:

Date:

Reservations			Completed by Program Staff		Participant Sign-In	
	Name	Sp Meal Rqst	Inelig	COP/CLA/ ElderCare	Signature	Under Age 60
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
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