



STEP BY STEP GUIDE FOR SENIOR NUTRITION PROGRAMS SEEKING TO WORK WITH FOOD RETAILERS (RESTAURANTS AND GROCERY STORES-FOR MEALS) DURING THE COVID-19 PUBLIC HEALTH EMERGENCY

The COVID-19 public health crisis is disrupting the ways in which businesses traditionally operate. Crises such as these open new avenues for community-based organizations to establish new partnerships, rekindle lapsed relationships and leverage a negative situation into an opportunity. Senior nutrition programs are uniquely positioned to adapt, ideate, and succeed in engaging traditional and untraditional partners to meet the evolving nutrition needs of the older adults that they serve. As many school districts and restaurants are shut down or operating at reduced capacity, thousands of pounds of perishable foods are available to be turned into meals for senior nutrition program participants.

Collaborating with these food retailers can serve as your primary or secondary senior nutrition contracts as you work to contend with the increased demand for meals on your community or increasing demand for additional meal types (i.e., breakfast or dinner meals). It may also be beneficial to lay the groundwork for contractual relationships with local restaurants and/or grocery food stores as part of your organization's emergency preparedness efforts.

For senior nutrition programs that have not engaged in such collaborations in the past, the prospect of launching a new initiative might be daunting. In addition, food retailers like grocery stores and restaurants, may not be familiar with the [Older Americans Act Nutrition Program](#). They may also need assistance becoming familiar with the different authorities available during the COVID-19 public health emergency and the requirements for meals produced that are eligible for funding under this legislation:

- See [FAQs Based on ACL Call with State Unit on Aging Directors](#)
- See [Overview of the nutrition services offered through the Older Americans Act Nutrition Program](#)
- See the Older Americans Act Comparison Chart on the [National Resource Center on Nutrition and Aging's COVID-19 webpage](#)

Since 2017, the Administration for Community Living has funded a cadre of senior nutrition programs across the country to develop and field inventive solutions to key business challenges for senior nutrition programs. Two recipients of the Innovations in Nutrition Programs and Services Grants from ACL were invited to share learnings from their funded projects that involved local restaurants and grocery stores.

ABOUT THE GRANTEES

- The **Heritage Area on Agency** has been a department of Kirkwood Community College since 1973 and was designated by the Iowa Department on Aging to serve Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties. Heritage serves people age 60 and above as well as their families, communities, and governments. In addition, The Heritage Agency serves as an Aging and Disability Resource Center (ADRC) serving adults 18 years of age and older with a disability through advocacy and options counseling.
- **The Erie County Department of Senior Services** was created in 1971 and subsequently designated an Area Agency on Aging under Title III of the Older Americans Act. The primary responsibilities which the Department has under the Older Americans Act and New York State Community Services for the Elderly Programs focus on planning, advocacy, and coordination activities.

ABOUT THEIR INNOVATION PROJECTS

- **Heritage Area Agency on Aging** sought to develop an innovative, replicable service delivery model for congregate meals titled “Encore Café.” This café concept was designed to encourage older adults to participate in congregate meal programs. In particular, the project aimed to attract the younger sub-population of older adults called “Baby Boomers” who had a smaller percentage of participation in recent years.
- **Erie County Department of Senior Services** collaborated with the Albany County Department for Aging added a technology driven congregate dining program including a restaurant dining program to current service models.

To learn more about these projects and others, visit: the Innovations in Nutrition Programs and Services Innovation Hub: <https://nutritionandaging.org/innovation-services-hub/>.

STEP BY STEP GUIDE

Step 1: Initiate a strategic planning process

Part 1: Get your planning team together:

- Internal Champions (for example): program managers, contract managers, relationship managers, registered dietitian nutritionist (RDN), or other individual with comparable nutrition expertise, senior leadership, food service managers
- External Champions (recommended): Persons who can support your efforts, facilitate networking, identify resources, potential partners, local restaurant association representatives, local grocery store leadership, Chambers of Commerce members, consumers from existing programs, other community service providers such as home health, government or public, senior-focused entities, etc.
 - Based on COVID-19 and local community, your organization may be more able, or less able, to engage these entities given the impact of the public health emergency

in your community. As speed is the goal, these external partners are noted as recommended but not required components of your team.

Part 2: Identify the expertise your team needs:

- Restaurant/grocery management/food service/catering experience;
- [In-depth understanding of the OAA Nutrition Program](#);
- [Different authorities available during the COVID-19 public health emergency](#);
- Knowledge of the local restaurant landscape;
- Knowledge of community – particularly if starting in a new community;
- Marketing/communications and outreach expertise;

Part 3: Host a strategy session with your team

- Host a strategy session with your team to determine the goals and objectives of your anticipated partnership – what product, programmatic, business and pricing goals to you have for your anticipated collaboration?

Part 4: Establish your target population:

- Evaluate local data to determine demographic profile, geographic location, nutrition needs, aging services usage, etc. of target population.
- Utilize previous information on customer preferences (client satisfaction, waste studies, etc.).

Step 2: Conduct an environmental scan

- Identify available restaurants; meals that are served locally, understand regional tastes, food customs, local expectations around portion sizes; identify grocery stores with kitchens. In addition, identify grocery stores with kitchens/food service operations. Grocery stores or restaurants with nutrition professionals such as a registered dietitian or individual of comparable expertise offer additional benefits.
- Identify a range of reasonable meal costs across your local community. Review published menus and call local food retailers to understand the range of these costs.

Step 3: Engage potential vendors

- Issue a Public Notice outlining partnership opportunity, overview of program and programmatic goals.
- Find restaurants that serve meals within the desired price point or those willing to agree to a mutually beneficial price.
- Look to find partners in areas of need as well. This may consist of using community partners in order to find out where to best engage those who are in potential hard to reach populations such as low-income/minority, rural, and persons with low English proficiency/immigrants/refugees.

Step 4: Review data collected and contract with identified vendor

- Collaborate with your identified food retail partner and negotiate a mutually beneficial contract for your collaboration.

Step 5: Develop implementation procedures, and launch partnership

- Review and finalize all product and programmatic specifications outlined in contract.
- Establish biweekly or monthly meetings with your food retailer partner to ensure continued communication as collaboration advance.
- Establish an implementation timeline and data management technology/accounting systems
- Prepare a protocol for meal delivery or pick up during the COVID-19 public health emergency. The contract with the identified vendor can include one or more options: using a meal voucher for take-out at the restaurant, delivery of meals to clients at their homes, or allowing a designed loved one to pick up meals for the senior client. Contracts should allow for a revisiting of the protocol to make the necessary adjustments as business returns to normal to allow for meal protocols to align with your State and local public health policies.
- Market the availability of this new partnership to your clients via varied media channels to educate them about the collaboration – noting also that that donations to support the initiative are welcome and that gratuities are included.

Key Questions to Inform Your Partnership Planning Process:

- Who should be on your team? What expertise should they have?
- Who is your target client? Where do they live, what do they need? What barriers to participation might they be confronting?
- What is the contracting process red tape that you will need to anticipate?
- Is there a registered dietitian nutritionist (RDN) /individual with comparable expertise that you can engage with to provide support for the identified project partner as they review and process the nutrition aspects of contract?
- How will you manage the transaction between the client and the vendor (i.e., paper voucher, key fob, or by phone)?
- How will you accept any program donations?
- How will you assure the vendor establishes an appropriate system to support tracking and reconciling client participation records?
- How should your vendor need to implement contactless delivery of meals to clients?
- How will you ensure that a variety of menus are available for clients to select from and still emphasize local/regional specialties while providing adequate nutrition.
- How to message and market your program so that your target clients understand how the program works... how to manage client expectations.
- The sustainability of the initiative – how will you ensure that the partnership lasts into the future, beyond the current moment?
- What price range for meal as part of the planned initiative are you willing to target? How does this price range stack up again the pricing of locally owned establishments that offer meals akin to those offered by your senior nutrition program? It is recommended that delivery fees and/or gratuities are included as part of the fee.

Materials to Create to Engage/Orient Your Restaurant and/or Grocery Store Partner:

- A partnership guide that outlines key aspects of the partnership to keep mind such as: OAA Nutrition Program requirements under the COVID-19 public health emergency, requirements for meals funded through Disaster Relief Funds following a declaration of a

major disaster, the Families First Coronavirus Response Act (FFCRA) and the Coronavirus Aid Relief and Economic Security (CARES) Act, key nutrient targets, sample consent forms, participation requirements such as the need to participate in surveys to evaluate programmatic outcomes, the need to adhere to nutrition program guidelines, specific policies they must adopt to limit fraud, waste and abuse, and guidelines for tipping for restaurant wait staff, etc.

- Frequently Asked Questions (FAQs) for restaurant dining participants so that they understand how the program works.
- On-going listing of comments and suggestions given to contractor on a monthly basis.

What Not to Do When Collaborating with a Restaurant or Grocery Store Partner:

- Regard your vendor as just a for-profit entity, in it for the profit. Restaurants or grocery stores can be a good partner – and often are seeking a win-win, zero-net-cost partnership opportunity with a community-based organization like yours
- Keep asking for donations – be prepared to pay full price for other services or resources that your organization needs – do not also go back to restaurant or grocery store partner to request free items
- Scare off potential partners with an onerous and complex Request for Proposals/bidding/contracting process – be sure information on the bid or contracting process is available in layman’s terms

What to Do Collaborating with a Restaurant or Grocery Store Partner:

- Consider designing a simplified menu with approved food items – see [Nutrition Requirements – DRIs/DGAs Under Supplemental Funding Due to the COVID-19 Emergency](#)
- During the negotiation and contracting process, consider designing meals within context of what the vendor can offer – be sure to identify food items that are easy for the vendor to obtain in order to meet needed menu requirements
- Consider seeking out persons with the following job titles as useful targets when working with restaurants and grocery stores: store directors, catering director, in-store registered dietitian nutritionist (RDN), banquet manager.
- Create an orientation presentation for your food retailer partner to introduce them to the requirements of the Older Americans Nutrition Program
- Engage a contract or staff registered dietitian nutritionist (RDN), /individual with comparable expertise to work with each restaurant or grocery store partner both during and after the contacting process
- Consider predominant aspects of local food culture and develop ways to factor that into contracting process to ensure programmatic success – i.e., Fish Fry Fridays
- Strive to create menus that meet the DRIs/DGAs requirements under Title IIIC or meals that meet the 1/3 calorie intake (see Table 1 below), if working under (the COVID-19 authorities)
- Strive to create menus that are appealing to the senior population (adults 60 years of age or older)
- Understand potential and actual limitations of restaurant or grocery store partner: understand that they are: 1) potentially new to the OAA/current flexibilities under supplemental funding due to the COVID-19 public health emergency and may need targeted

technical assistance, and 2) may be currently experiencing food sources shortages thus may have limited food supply

- Work closely with identified partner – for example, engage the catering manager at partner organization to take the lead in key aspects of the partnership, such as menu writing
- Ask your food retail partner if they can dedicate an employee to your collaboration or alternatively, carefully explore if your partner can offer in-kind support (i.e., coupon books, gift cards)
- Include information within the final contract on the Older American Act Nutrition Program guidelines and the Families First, Cares, and Disaster guidelines and expiration dates so the vendor is clear on expectations and requirements.
- Treat selected vendor like any other subcontractor. Meet with them on a regular basis (i.e. monthly, etc.) during the first several months to discuss successes and challenges on both sides.
- Create communications and marketing materials in anticipation of the planned start date for the initiative during the strategic planning process
- Create marketing materials that are clear and specific to ensure understanding of partnership by target population.
- Co-create a checklist for grocery store, restaurant employees and volunteers to orient them to their various roles

TABLE 1: ESTIMATED CALORIE NEEDS PER DAY, BY AGE, SEX AND PHYSICAL ACTIVITY LEVEL

Males				Females			
Age	Sedentary	Moderately Active	Active	Age	Sedentary	Moderately Active	Active
56-60	2,200	2,400	2,600	56-60	1,600	1,800	2,000
61-65	2,000	2,200	2,600	61-65	1,600	1,800	2,000
66-70	2,000	2,200	2,600	66-70	1,600	1,800	2,000
71-75	2,000	2,200	2,600	71-75	1,600	1,800	2,000
76+	2,000	2,200	2,400	76+	1,600	1,800	2,000

Source: Excerpted from the Dietary Guidelines for Americans 2015-2020, Appendix 2, Table A2-1. Available at: <https://health.gov/our-work/food-nutrition/2015-2020-dietary-guidelines/guidelines/appendix-2/>

SAMPLE POLICY AND PROCEDURES

The Older Americans Act is written to allow for State and Local administered programs. Therefore, State and Local determine and set policies and procedures. These samples reflect this and you are encouraged to work with your State and local entities as you establish resources you will need.

Heritage Area Agency on Aging

- [VENDOR REQUEST FOR INFORMATION](#)
- [VENDOR CONTRACT](#)
- [VENDOR POLICIES AND PROCEDURES](#)