2051 Ebenezer Road, Suite B
Rock Hill, SC 29732

Request for Proposals RFP#CATAWBA AAA 2024-Meals
Purchase of Older Americans Act Meal Services

Date of Issue:
January 19, 2024

Proposal Due Date:
March 13, 2024, 4:00 P.M. EST.

ACKNOWLEDGEMENT OF CONDITIONS

RFP#CATAWBA AAA 2024-Meals

PROJECT: Purchase of Older Americans Act Meal Services under Title III of the Older Americans Act of 1965, as amended, and State funded Programs of the South Carolina State Unit on Aging for the Catawba Region in South Carolina.

REQUIREMENTS: Enclosed

SCOPE OF WORK: **Catawba Area Agency on Aging seek**s proposals from firms qualified to provide Older Americans Act meal services in its four-county region. This region includes Chester, Lancaster, Union, and York Counties in South Carolina. The primary purpose of this program is to fulfill the requirements of the Older Americans Act, as amended in 2020, by providing nutritionally balanced meals to strategically located centers that provide meals and socialization to eligible individuals.

QUESTIONS: All questions must be received by **January 31, 2024**
Questions must be submitted via email or mail and directed to:
Barbara.Robinson@catawba-aging.com

PROPOSAL SUBMISSION: Catawba Area Agency on Aging
2051 Ebenezer Road, Suite B
Rock Hill, SC 29732
OUTSIDE OF THE ENVELOPE MUST BE MARKED:
RFP#CATAWBA AAA 2024-Meals

SUBMISSION DEADLINE: **March 13, 2024, at 4:00 PM EST.**

THE INFORMATION BELOW MUST BE FULLY COMPLETED AND SIGNED FOR A PROPOSAL TO BE VALID

By signing this Statement, I certify that we (firm) will comply with all requirements contained within the RFP.

AUTHORIZED SIGNATURE	PRINTED NAME		DATE
COMPANY FULL LEGAL NAME			DUNS NUMBER
MAILING ADDRESS			
CITY	STATE	ZIP CODE	PHONE
EMAIL			

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In Accordance with 2 CFR 200.321, The Catawba Area Agency on Aging will ensure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

PART 1. INVITATION

Catawba Area Agency on Aging (Catawba AAA) seeks proposals from firms qualified to provide Older Americans Act meal services in Chester, Lancaster, Union, and York Counties of South Carolina.

Catawba Area Agency on Aging is a not-for-profit of the State of South Carolina formed to provide planning and development services in Chester, Lancaster, Union, and York Counties,

To qualify for consideration, **one (1) original, one (1) flash drive, and five (5) copies** of your proposal must be received by the office designated above by **4:00 pm on March 13, 2024** It is the sole responsibility of the Respondent to see that the proposal is received before the submission deadline. The Respondent shall bear all risks associated with delays in the U.S. mail or delivery service. Late proposals will not be considered. **Proposals shall be accepted in person, by U.S. Mail, or by private courier service.** Proposals will be opened at 4:15 **PM on March 13, 2024**, at 2051 Ebenezer Road, Suite B, Rock Hill, SC, in the presence of at least two witnesses. Only the names of respondents will be disclosed at that time.

Proposals must be made in the official name of the firm or individual under which business is conducted (showing official business address) and must be signed by a person duly authorized to legally bind the person, partnership, company, or corporation submitting the proposal.

A proposal Evaluation Committee panel will evaluate the proposals according to the criteria outlined in Part 4 – Selection Criteria.

This solicitation does not commit Catawba Area Agency on Aging to award a contract, to pay any cost incurred in preparing a proposal, or to procure or contract for the articles of goods or services. Catawba Area Agency on Aging reserves the right to accept or reject any or all proposals received because of this request, to negotiate with all qualified respondents, or to cancel in part or its entirety this proposal if it is in the best interest of Catawba Area Agency on Aging to do so.

Any requests for clarification or additional information deemed necessary by any respondent to present a proper proposal must be submitted via email by January 31, 2024, with a subject line of "Questions - RFP Meal Services" to:

E-mail to: **Barbara.Robinson@catawba-aging.com**

Emailed questions or requests for clarification must be received before the question deadline stated above. Any request received after the above-stated deadline will not be considered. All requests received before the above deadline will be responded to in writing in the form of an addendum addressed and emailed to all prospective respondents.

Restrictions Applicable to Offers: Violating restrictions may result in disqualification of your offer, suspension, or debarment and may constitute a violation of the South Carolina State Ethics Act. After issuance of the solicitation, ***you agree not to discuss this procurement activity in any way with other companies or the Catawba Area Agency on Aging or its employees, volunteers, agents, or officials.*** Any communication regarding the submission, evaluation, or award must be solely addressed to the procurement coordinator or designee. This restriction may be lifted by express written permission from the procurement coordinator.

The proposal will be awarded based on Catawba Area Agency on Aging total requirements to one respondent for one (1) year, with the option to extend for four (4) additional one-year periods.

PART 2. ROLE OF CONTRACTOR/SCOPE OF WORK

This RFP aims to fulfill the requirements of the Older Americans Act, as Amended in 2020, by providing nutritionally balanced meals to strategically located centers that provide meals and socialization to eligible individuals. Please refer to Appendix A for additional details on the scope of work required under this RFP.

The Respondent must meet the broad spectrum of the statutes appropriate to the conduct of the Nutrition Program for the Elderly and any regulations and policies published by the U. S. Department of Health and Human Services, the Administration of Community Living, the Department on Aging, and Catawba Area Agency on Aging. The Respondent will be required to meet, but not be limited to, the criteria listed within.

Information about the Older Americans Act referred to in this proposal may be obtained from the Administration for Community Living at www.acl.gov/node/650.

Sites and Number of Meals - A list of the sites to which meals must be delivered is shown on the next page (6). The list includes the proposed number and types(s) of meals to be delivered to each site per day. The Contractor's food delivery schedules must work with the local Nutrition Food Service delivery schedule for overall food safety practices. Catawba Area Agency on Aging considers the food delivery schedule beginning at the point of the kitchen departure to be received at the beneficiary's home.

Table 1: Sites and Number of Meals

It is estimated that there will be approximately **249** serving days during the contract period of **July 1, 2024, through June 30, 2025**. Delivery times reflect the time food should be delivered to the nutrition site.

Name of Site, County	Estimated Number of **Daily** Congregate Meals	Estimated Number of **Daily** Home Delivered Meals	Estimated Number of **Weekly** Frozen Meals	Expected Delivery Time (no later than)
Chester Senior Center Chester County	20		243	9:00
Edgemoor Site Chester County	16		14	9:30
Great Falls Nutrition Site Chester County	16			9:30
Lancaster Senior Center Lancaster County	51	81	*52*	9:00
Heath Springs Site Lancaster County	10	10	6	9:00
Kershaw Satellite Center Lancaster County	6	71	0	9:00
Union Senior Center Union County	40	61		9:00
Jonesville Nutrition Site Union County	19	23		9:00
Rock Hill Senior Center York County	67	132	59	8:30
York Senior Center York County	34	20		8:30
Clover Nutrition Site York County	21	9		9:00
TOTALS	**300**	**407**	**374**	

NOTE: Estimated numbers above are based on meals delivered in FY 2018 before the pandemic.

PART 3. PROPOSAL SUBMISSION REQUIREMENTS

This section provides a summary of information to be included in fulfilling the requirements of this RFP. Proposals must be submitted in the format outlined in this section. Respondents must furnish all information required by the request.

Respondents may submit a proposal for the package as a whole, on an individual county basis, or for individual services. However, all sites in a county must be served by the successful Respondent. The successful Respondent may be requested to provide meals at the same cost to additional sites in a county as funding becomes available. Where the Respondent's proposal cannot fully comply with the Request for Proposals requirements, the proposal must list all exceptions as an addendum to the proposal package.

- The requirements stated herein do not preclude Respondent from furnishing additional information as deemed appropriate. The inclusion of extraneous information is strongly discouraged. Attachment A, for the full Minimum Meals Specifications, https://aging.sc.gov/sites/default/files/documents/Minimum%20Meal%20Specifications%203-4-2021.pdf

1. **Letter of Transmittal**
   This section is limited to two printed pages. One page should include the signed and dated Acknowledgement of Conditions, page 2 of this solicitation. Also, provide a cover letter that includes a summary of the contractor's ability to perform the services described herein and a statement that the contractor is willing to perform those services and enter into a contract with Catawba Area Agency on Aging. The cover letter must be signed by someone with the authority to commit the contractor to a contract and should contain the person's title, address, and phone number.

   The Letter of Transmittal must also include confirmation that the proposal is valid for one hundred and twenty (120) days from the submission deadline.

2. **References**
   References from three (3) agencies your agency has conducted work of a similar nature within the past three years, with at least one being for an agency outside the Aging Network. Provide a contact name, phone number, and email address where available. We reserve the right to check references not included in this proposal. Respondents must be licensed to do business in the State of South Carolina.

3. **Understanding**
   Respondent shall include an understanding of the scope of work and a general statement of the solution the Respondent plans to offer to Catawba Area Agency on Aging.

   Describe in detail your approach to the provisions contained within the requirements embedded in this Request for Proposals by submitting information for each of the specifications that must be met. To meet the Preferred Proposal content, describe the Nutrition Education services offered and include expectations and limitations.

   It is the goal of the Catawba Area Agency on Aging to contract with a strategic partner. As a strategic partner, the Caterer should:

- Be forward thinking to identify and bring to our clientele new/emerging technology and innovations that support the Catawba Area Agency on Aging's mission of providing long-term care services and support in an efficient, dependable, and cost-effective manner;
- Initiate meetings no less than annually with the Catawba Area Agency on Aging.

If you intend to subcontract with another business for any portion of the work that exceeds 10% of your price, your offer must identify that business and the portion of work they are to perform. Identify potential subcontractors by providing the business name, address, phone, taxpayer identification number, and point of contact. In determining your responsibility, the Catawba Area Agency on Aging may evaluate your proposed subcontractors and ask for additional information. All tools and resources needed at the acceptor location must be delivered before the first service date.

4. **Cost Proposal**
   Provide unit cost to meet the scope of work using the format provided in **Appendix A** of this RFP.

5. **Minimum Specifications Required Information**

6. **Meal Cost Analysis worksheets**

7. **Location of vendor and food production facilities –** Information on the number, type, and age of delivery vehicles shall be included with this description. A statement regarding whether a distribution site will be utilized to service the Contract and how this space will be secured/obtained.

8. **Food Safety and Inspection Report – A narrative, not to exceed two (2) pages, describing the Respondent's procedures that will follow all food safety practices.**
   - Describe your procedure for ensuring meals are delivered to the local provider within acceptable temperature parameters.
   - Describe your procedure for meals rejected by the local provider as unsafe (i.e., upon delivery, time and/or temperature indicates that food is unsafe to distribute).

9. **USDA/FDA Certification "as applicable"**

10. **Quality Assurance Procedures**

11. **Vendor Proposed Route Schedule**

12. **Proposed Menu Plans/Serving Guide**

13. **SC Menu Checklist Sheet for each meal type: Meal Pattern or Nutrient Analysis**

14. **Meal Choice Description - A narrative, not to exceed three (3) pages, describing the Respondent's ability to offer meal choices to clients. The narrative should detail the following:**
    - Number of congregate meal options
    - Number of home-delivered meal options
    - Number of cold box/bag meal options
    - Frequency of menu rotations

15. **Description of Meal and Beverage Service Equipment and Supplies**

16. **Itemized description of Food Management Staff/Qualifications –** be sure to include resumes of

key personnel (such as the Executive Director, Kitchen Manager, etc.), the history of your firm, the number of years in business, current Ownership arrangement, and specific examples of experience providing services to Older Adults. This section is limited to 3 pages (not including resumes). Please also include a copy of the www.SAM.gov registration confirmation that clearly identifies the agency name, address, and current SAM status.

17. **Description of Maximum Meal Production load and current production volumes for each production facility.**

18. **Contingency plans – A narrative, not to exceed three (3) pages, describing the Respondent's contingency plans (i.e., emergency preparedness plans). The narrative is to include a plan for dealing with the following:**

    - Food and supply shortages
    - Food safety concerns (i.e., contamination, failed temperature controls, food recalls)
    - Staffing shortages
    - Equipment and vehicle failures
    - Environmental emergencies (i.e., weather, power outages, domestic disturbances)
    - A detailed example of when this contingency plan was utilized and the outcome.
    - Describe your agency's Continuity of Operations Plan

19. **Commencement of Services – A narrative, not to exceed three (3) pages, describing the plan for ensuring that the meal delivery service will begin on July 1, 2024. The narrative must include, at minimum:**
    - A statement describing the ability to provide regular and shelf-stable meals
    - A statement describing the capacity to provide the number of meals served in the counties you plan to provide meal services Older American Act Meals in FY 2024-2025.
    - A plan for securing and training staff and determining additional staffing need
    - A plan for securing any additional equipment necessary to execute requirements
    - An explanation of the ordering, preparation, packaging, and distribution of meals to include the ability to accommodate 2-3-5-7-day packaging options and delivery to all nutrition locations you plan to serve and plan for educating Nutrition Providers on these processes
    - A delivery plan of Congregate Meals and Home Delivered Meals for the first day of service under the Contract

20. **Liability Insurance –** Minimum insurance coverage carried by the Respondent shall not be less than the following:

Worker's Compensation	$250,000 each person
Comprehensive (Including Products)	$1,000,000 each occurrence
	$250,000 property damage; each occurrence
Automotive Liability	$250,000 each person
	$1,000,000 each occurrence
	$250,000 property damage; each occurrence

21. **Addendum(s) – Acknowledge addendum(s) if any.**

22. **Other Requirements – As stated in the invitation, one (1) original plus one (1) flash drive and**

FIVE (5) copies of your proposal are required.

Respondents shall fully inform themselves of the conditions, requirements, and specifications before submitting their proposal. Failure to do so shall be at Respondent's own risk and the Respondent cannot secure relief by plea of error.

Neither law nor regulations make allowance for error of omission or commission on the part of the Respondent.

FAILURE TO INCLUDE ALL REQUIRED SUBMISSION MATERIALS MAY RENDER THE PROPOSAL NON-RESPONSIVE, AS DETERMINED BY THE CATAWBA AREA AGENCY ON AGING.

PART 4. SELECTION CRITERIA

Proposals will be evaluated on a weighted score based on the following criteria:

a. 25% of Respondent's demonstrated understanding of the project and approach to providing the services, as reflected by its proposal package.
b. 45% Respondent's experience, including references, financial stability, and description of its ability to perform the required service.
c. 30% Cost of the services as stated in the proposal. Cost will not be the sole determining factor for the award.

Catawba Area Agency on Aging may elect to make an award without conducting negotiations. However, after the offers have been ranked, Catawba Area Agency on Aging may elect to negotiate the price or the general scope of work with the highest-ranked Respondent. If a satisfactory agreement cannot be reached, negotiations may be conducted with the second, and then the third, and so on, ranked Respondents to such level of ranking as determined by Catawba Area Agency on Aging.

PART 5. QUALIFICATIONS OF RESPONDENTS

Catawba Area Agency on Aging may make such investigations as it deems necessary to determine the ability of a Respondent to furnish the required materials and services, and the Respondent will furnish all information and data for this purpose as Catawba Area Agency on Aging may reasonably request.

The proposal evaluation committee panel shall evaluate proposal submissions. The Committee will then recommend an award using the selection criteria set forth above.

Discussions may be conducted with Respondents who submit proposals determined to be reasonably capable of being selected for award for clarification to assure full understanding of and responsiveness to the solicitation requirements. While conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing respondents.

Catawba Area Agency on Aging reserves the right to reject a proposal if the evidence submitted by or the investigation of such Respondent fails to satisfy Catawba Area Agency on Aging that the Respondent is properly qualified to carry out the obligations of the Contract and to deliver the equipment and services described herein.

PART 6. METHOD OF AWARD

Catawba Area Agency on Aging intends to execute a single contract with the top-recommended

Respondent for the outlined services, as determined by the proposal evaluation committee panel and the guidelines of the Catawba Area Agency on Aging Procurement policies. If a contract cannot be successfully negotiated with the top-recommended Respondent, the panel will proceed to the next recommended Respondent, and so on, until an acceptable contract is negotiated.

Catawba Area Agency on Aging reserves the right to reject any proposals and waive minor informalities and technicalities to make a selection, if any, based solely on the best interests of Catawba Area Agency on Aging.

PART 7. TERMINATION

Funds for this contract are payable by the Catawba Area Agency on Aging. In the event no funds or insufficient funds are made available for payments due under this contract, Catawba Area Agency on Aging shall immediately notify the firm of such occurrence, and this contract shall create no further obligation of Catawba Area Agency on Aging as to such current or succeeding fiscal year and shall be null and void, except as to the portions of payments herein agreed upon for funds which shall have been appropriated and budgeted. In such an event, this contract shall terminate on the last day of the fiscal year for which appropriations were received without penalty or expense to Catawba Area Agency on Aging of any kind whatsoever. No right of action or damages shall accrue to the benefit of the firm as to that portion of this contract that may so terminate. Catawba Area Agency on Aging shall provide the successful firm with notice not less than thirty (30) days before the date of cancellation if such a time is available. If programmatic changes do not allow for thirty (30) days' notice, prompt notice will be provided with as much lead time as possible. In the event of the occurrence of the circumstances described immediately above, the firm shall not prohibit or otherwise limit Catawba Area Agency on Aging's' right to pursue and contract for alternate solutions and remedies as deemed necessary by Catawba Area Agency on Aging for the conduct of its affairs. All provisions stated herein shall apply to any amendment or the execution of any option to extend the contract.

PART 8. COMPLIANCE WITH LAWS, CODES, ORDINANCES, AND INDUSTRY STANDARDS

During the contract term, it shall be the contracted firm's responsibility to ensure compliance with all applicable provisions of laws, codes, ordinances, rules and regulations, tariffs, and industry standards. The contracted firm will also be held professionally liable for the work of any utilized subcontractors. It shall provide assurances that such personnel will devote sufficient time to carry out the designated scope of project work properly.

PART 9. OTHER CONDITIONS

Debarment, Suspension, and Other Matters Related to Public Transactions

The prospective firm certifies, to the best of its knowledge and belief, that it and its principals:

a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency

b) Have not within three years preceding this proposal been convicted of or had a civil judgment rendered against it for the commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property.

Drug-Free Workplace

If awarded a contract, Respondent agrees to comply with the Federal Drug-Free Workplace Act, and Title 44, Chapter 107 of the South Carolina Code of Laws, as amended.

Confidential Information

For every document that the Respondent submits in response to or about this request, the Respondent must separately mark with the word "CONFIDENTIAL" every page, or portion thereof, that the Respondent contends contains information that is exempt from public disclosure because it is either (a) a trade secret as defined in Section 30-4-40(a) (1), or (b) privileged and confidential, as that phrase is used in Section 11-35-410. For every document Respondent submits in response to or about this request, Respondent must separately mark with the words "TRADE SECRET" every page, or portion thereof, that Respondent contends contains a trade secret as that term is defined by Section 39-8-20 of the Trade Secrets Act. For every document Respondent submits in response to or about this request, Respondent must separately mark with the word "PROTECTED" every page, or portion thereof, that Respondent contends is protected by Section 11-35-1810. All markings must be conspicuous; use color, bold, underlining, or some other method to distinguish the mark from the other text conspicuously. Do not mark your entire response (proposal, quote, etc.) as confidential, trade secret, or protected! If your response, or any part thereof, is improperly marked as confidential or trade secret or protected, Catawba Area Agency on Aging may, in its sole discretion, determine it non-responsive. If only portions of a page are subject to some protection, do not mark the entire page. By submitting a response to this request, Respondent (1) agrees to the public disclosure of every page of every document regarding this request that was submitted at any time before entering into a contract (including, but not limited to, documents contained in a response, documents submitted to clarify a response, and documents submitted during negotiations), unless the page is conspicuously marked "TRADE SECRET" or "CONFIDENTIAL" or "PROTECTED," (2) agrees that any information not marked, as required by these proposal instructions, as a "Trade Secret" is not a trade secret as defined by the Trade Secrets Act, and (3) agrees that, notwithstanding any claims or markings otherwise, any prices, commissions, discounts, or other financial figures used to determine the award, as well as the final contract amount, are subject to public disclosure. In determining whether to release documents, Catawba Area Agency on Aging will detrimentally rely on the Respondent's marking of documents, as required by these proposal instructions, as being either "Confidential," "Trade Secret," or "PROTECTED." By submitting a response, Respondent agrees to defend, indemnify, and hold harmless the Catawba Area Agency on Aging, its officers, and employees from every claim, demand, loss, expense, cost, damage, or injury, including attorney's fees, arising out of or resulting from the State withholding information that Respondent marked as "confidential" or "trade secret" or "PROTECTED".

SECURITY

Due to the nature of the information managed by the State and/or Area Agency on Aging under this contract, any event resulting in a potential loss of confidentiality, integrity, and/or availability of sensitive data is unacceptable. The contractor shall develop and maintain a security and privacy program with effective security and privacy controls compliant with the most current version of the industry standard Cyber Security Framework (https://www.nist.gov/cyberframework). Security and privacy controls shall be well documented, management enforced, and comply with all applicable security and privacy laws, regulations, policies, and other related breach notification laws and directives.

Information available to the provider/contractor about a client should only be used to provide or connect a client with needed services. Any information collected separately by the provider/contractor should also adhere to privacy and security standards, including documentation of what and how that information will be used, along with the client's signed consent.

The developed security and privacy program must support, at a minimum, the following privacy principles:

- Confidentiality – preserve authorized restrictions on access and disclosure, including means for protecting personal privacy and proprietary information. A loss of confidentiality is the

unauthorized disclosure of information.

• Integrity – guard against improper information modification or destruction and ensure information nonrepudiation and authenticity. A loss of integrity is the unauthorized modification or destruction of information.

The contractor/provider must also provide:

• Documentation outlining the methodology used to defend against, identify, respond to, and mitigate the risk of any sensitive data breaches.

• Documentation of notifying Catawba AAA when a potential breach occurs and the steps the contractor/provider will take to resolve breaches and recover unauthorized release of information.

Security Assessment Questionnaire:

1. Describe your policies and procedures that ensure access to sensitive information is limited to only those of your employees and volunteers who require access to perform your proposed services.
2. What safeguards and practices do you have in place to vet your employees and volunteers who will have access to sensitive information?
3. Describe the policies, procedures, and practices in place to provide physical security of your papers with sensitive data and access to sensitive areas in your organization.

Competition

This process is intended to promote competition. If the language, specifications, terms, and conditions or any combination thereof restricts or limits the requirements in this RFP to a single source, it shall be the responsibility of the Respondent to notify Catawba Area Agency on Aging in writing so as to be received five (5) days prior to the opening date. The Request for Proposals may or may not be changed but an evaluation committee of such notification will be made prior to the award.

Right to Protest

Right to protest: Any actual or prospective Respondent, offeror, or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the Executive Director of Catawba Area Agency on Aging. The protest shall be submitted in writing within fourteen (10) calendar days after the aggrieved person knows or should have known of the facts giving rise thereto.

STANDARD TERMS AND CONDITIONS

SCOPE: THE FOLLOWING TERMS AND CONDITIONS WILL PREVAIL UNLESS OTHERWISE NOTIFIED BY CATAWBA AREA AGENCY ON AGING WITHIN THIS REQUEST FOR PROPOSALS DOCUMENT. CATAWBA AREA AGENCY ON AGING RESERVES THE RIGHT TO REJECT ANY PROPOSAL THAT TAKES EXCEPTION TO THESE TERMS AND CONDITIONS.

DEFINITIONS USED HEREIN:

A. "PROPOSAL REQUEST" MEANS A SOLICITATION OF A FORMAL SEALED REQUEST FOR PROPOSALS
B. "RESPONDENT" MEANS VENDOR
C. "PROPOSAL" MEANS THE SUBMISSION OF QUALIFICATIONS AND COST PROPOSAL OFFERED BY THE VENDOR
D. "CATAWBA AREA AGENCY ON AGING" MEANS CATAWBA AAA

COMPLETING PROPOSAL: ALL INFORMATION MUST BE LEGIBLE. ANY AND ALL CORRECTIONS AND/OR ERASURES MUST BE INITIALED. THE AUTHORIZED RESPONDENT MUST SIGN THE PROPOSAL, AND THE REQUIRED INFORMATION MUST BE PROVIDED.

CONFIDENTIALITY OF PROPOSAL INFORMATION: EACH PROPOSAL MUST BE IN A SEALED ENVELOPE AND MARKED TO PROVIDE CONFIDENTIALITY OF THE PROPOSAL INFORMATION BEFORE THE OPENING. SUPPORTING DOCUMENTS AND/OR DESCRIPTIVE LITERATURE MAY BE SUBMITTED WITH THE PROPOSAL OR IN A SEPARATE ENVELOPE MARKED LITERATURE FOR RFP (NUMBER). DO NOT INDICATE PRICES IN THE LITERATURE.

ACCURACY OF PROPOSAL: EACH PROPOSAL IS MADE PUBLIC RECORD OF THE CATAWBA AREA AGENCY ON AGING AFTER THE AWARD. THEREFORE, IT IS NECESSARY THAT ANY AND ALL INFORMATION PRESENTED IS ACCURATE AND/OR WILL BE THAT BY WHICH THE RESPONDENT WILL COMPLETE THE CONTRACT.

SUBMISSION OF PROPOSAL: PROPOSALS ARE TO BE SEALED AND SUBMITTED TO CATAWBA AREA AGENCY ON AGING VIA MAIL TO OR HAND CARRY TO THE ADDRESS STATED IN THE INVITATION BEFORE THE DATE AND TIME INDICATED ON THE COVER SHEET.

ADDENDA: ALL CHANGES IN CONNECTION WITH THIS PROPOSAL WILL BE ISSUED BY THE CATAWBA AREA AGENCY ON AGING IN THE FORM OF A WRITTEN ADDENDUM. SIGNED ACKNOWLEDGMENT OF RECEIPT OF EACH ADDENDUM MUST BE SUBMITTED WITH THE PROPOSAL.

LATE PROPOSALS AND MODIFICATIONS OR WITHDRAWALS: PROPOSALS RECEIVED AFTER THE DEADLINE DESIGNATED IN THIS RFP WILL NOT BE CONSIDERED. PROPOSALS MAY BE WITHDRAWN OR MODIFIED BEFORE THE DEADLINE DATE AND TIME INDICATED FOR SUBMISSION ON THE COVER SHEET.

PROPOSAL CONDITION OF PRICE: ALL COST PROPOSALS SUBMITTED SHALL REMAIN EFFECTIVE FOR A MINIMUM PERIOD OF 120 DAYS OR UNTIL EVALUATION IS COMPLETE AND AWARD IS MADE. AFTER THAT, THE CONTRACT PRICE SHALL REMAIN EFFECTIVE FOR THE CONTRACT'S TERM.

INSURANCE: THE CONTRACTOR SHALL PROCURE, MAINTAIN, AND PROVIDE PROOF OF INSURANCE COVERAGE FOR INJURIES TO PERSONS AND/OR PROPERTY DAMAGE AS MAY ARISE FROM OR IN CONJUNCTION WITH, THE WORK PERFORMED ON BEHALF OF CATAWBA AREA AGENCY ON AGING BY THE CONTRACTOR, HIS AGENTS, REPRESENTATIVES, EMPLOYEES OR SUBCONTRACTORS AT THEIR EXPENSE PROOF OF COVERAGE SHALL BE SUBMITTED BEFORE ENTERING INTO THE CONTRACT AND SUCH COVERAGE SHALL BE MAINTAINED BY THE CONTRACTOR FOR THE DURATION OF THE CONTRACT PERIOD FOR OCCURRENCE POLICIES. CLAIMS MADE POLICIES MUST BE IN FORCE OR THAT COVERAGE PURCHASED FOR THREE (3) YEARS AFTER THE CONTRACT COMPLETION DATE.

NEW MATERIALS, SUPPLIES OR EQUIPMENT: UNLESS OTHERWISE SPECIFIED, ALL MATERIALS, SUPPLIES OR EQUIPMENT OFFERED BY A VENDOR WILL BE NEW, UNUSED, OF RECENT MANUFACTURE, FIRST CLASS IN EVERY RESPECT, AND SUITABLE FOR THEIR INTENDED PURPOSE. ALL EQUIPMENT WILL BE ASSEMBLED AND FULLY SERVICED, READY FOR OPERATION WHEN DELIVERED.

WARRANTY: SUPPLIES OR SERVICES FURNISHED AS A RESULT OF THIS PROPOSAL WILL BE COVERED BY THE MOST FAVORABLE COMMERCIAL WARRANTIES, EXPRESSED OR IMPLIED, THAT THE VENDOR AND/OR MANUFACTURER GIVES TO ANY CUSTOMER. THE RIGHTS AND REMEDIES PROVIDED HEREIN ARE IN ADDITION TO AND DO NOT LIMIT ANY RIGHTS AFFORDED TO THE CATAWBA AREA AGENCY ON AGING BY ANY OTHER CLAUSE OF THIS PROPOSAL. CATAWBA AREA AGENCY ON AGING RESERVES THE RIGHT TO REQUEST FROM VENDORS A SEPARATE MANUFACTURER CERTIFICATION OF ALL STATEMENTS MADE IN THIS PROPOSAL.

METHOD OF AWARD AND NOTIFICATION: PROPOSALS WILL BE ANALYZED, AND THE AWARD WILL BE MADE, BASED ON THE EVALUATION CRITERIA FOR THIS PROPOSAL, TO THE BEST-QUALIFIED VENDOR. CATAWBA AREA AGENCY ON AGING RESERVES THE RIGHT TO REJECT ANY OR ALL PROPOSALS AND ANY PART OF A PROPOSAL TO WAIVE INFORMALITIES, TECHNICAL DEFECTS, AND MINOR IRREGULARITIES IN PROPOSALS RECEIVED.

CREDIT TERMS: THE VENDOR WILL INDICATE ALL DISCOUNTS FOR FULL AND/OR PROMPT PAYMENT. DISCOUNT WILL BE

CONSIDERED AS A COST FACTOR IN THE DETERMINATION OF AWARD, EXCEPT DISCOUNTS OFFERED FOR PAYMENT WITHIN LESS THAN TEN (10) CALENDAR DAYS. DISCOUNTS OFFERED WILL BE COMPUTED FROM THE DATE OF RECEIPT OF THE CORRECT INVOICE OR RECEIPT AND ACCEPTANCE OF PRODUCTS, WHICHEVER IS LATER.

SAFETY: ALL PRACTICES, MATERIALS, SUPPLIES, AND EQUIPMENT WILL COMPLY WITH THE FEDERAL OCCUPATIONAL SAFETY AND HEALTH ACT, AS WELL AS ANY PERTINENT FEDERAL, STATE AND/OR LOCAL SAFETY OR ENVIRONMENTAL CODES. IT IS THE RESPONSIBILITY OF THE VENDOR TO PROVIDE MATERIAL SAFETY DATA SHEETS FOR PRODUCT(S) REQUIRING THE SAME.

DISCLAIMER OF LIABILITY: CATAWBA AREA AGENCY ON AGING AND/OR ANY OF ITS AGENCIES WILL NOT HOLD HARMLESS OR INDEMNIFY ANY RESPONDENT FOR ANY LIABILITY WHATSOEVER.

HOLD HARMLESS: THE CONTRACTOR AGREES TO PROTECT, DEFEND, INDEMNIFY AND HOLD CATAWBA AREA AGENCY ON AGING, ITS OFFICERS, EMPLOYEES AND AGENTS FREE AND HARMLESS FROM AND AGAINST ANY AND ALL LOSSES, PENALTIES, DAMAGES, SETTLEMENTS, COSTS CHARGES, PROFESSIONAL FEES OR OTHER EXPENSES OR LIABILITIES OF EVERY KIND AND CHARACTER ARISING OUT OF OR RELATING TO ANY AND ALL CLAIMS, LIENS, DEMANDS, OBLIGATIONS, ACTIONS, PROCEEDINGS OR CAUSE OF ACTION OF EVERY KIND AND CHARACTER IN CONNECTION WITH OR ARISING DIRECTLY OR INDIRECTLY OUT OF THIS AGREEMENT AND/OR THE PERFORMANCE HEREOF, WITHOUT LIMITING THE GENERALITY OF THE FOREGOING, ANY AND ALL SUCH CLAIMS, ETC., RELATING TO PERSONAL INJURY, INFRINGEMENT OF ANY PATENT, TRADEMARK, COPYRIGHT, (OR APPLICATION FOR ANY THEREOF) OR OF ANY OTHER TANGIBLE OR INTANGIBLE PERSONAL OR PROPERTY RIGHT, OR ACTUAL OR ALLEGED VIOLATION OF ANY APPLICABLE STATUTE, ORDINANCE, ADMINISTRATIVE ORDER, RULE OR REGULATION, OR DECREE OF ANY COURT WILL BE INCLUDED IN THE INDEMNITY HEREUNDER. THE CONTRACTOR FURTHER AGREES TO INVESTIGATE, HANDLE, RESPOND TO PROVIDE DEFENSE FOR AND DEFEND ANY SUCH CLAIMS, ETC. AT HIS/HER SOLE EXPENSE AND AGREES TO BEAR ALL OTHER COSTS AND EXPENSES RELATED TO THERETO, EVEN IF SUCH CLAIM IS GROUNDLESS, FALSE OR FRAUDULENT.

LAW GOVERNING: ALL CONTRACTUAL AGREEMENTS WILL BE SUBJECT TO, GOVERNED BY, AND CONSTRUED ACCORDING TO THE LAWS OF THE STATE OF SOUTH CAROLINA.

NON-DISCRIMINATION CLAUSE: NO RESPONDENT TO THIS REQUEST WILL IN ANY WAY, DIRECTLY OR INDIRECTLY, DISCRIMINATE AGAINST ANY PERSON BECAUSE OF AGE, RACE, COLOR, INDIVIDUAL WITH PHYSICAL DISABILITY, SEX, NATIONAL ORIGIN, OR RELIGIOUS CREED.

AMERICANS WITH DISABILITIES ACT (ADA): THE FIRM SHALL COMPLY WITH THE ADA, AS APPLICABLE.

CATAWBA AREA AGENCY ON AGING IS AN EQUAL OPPORTUNITY PROVIDER AND EMPLOYER.

Key Events and Dates (Subject to change)

PROCUREMENT 2024			
Step	**Description**	**Date**	**Time (if applicable)**
1	Request for Proposal (RFP) Issued	Friday, January 19, 2024	
2	Deadline for Receipt of Questions	Wednesday, January 31, 2024	
3	Offeror's Conference, Mandatory	Thursday, February 6, 2024 York County Regional Chamber of Commerce 116 E. Main St. Rock Hill, SC 29731	@ 10:00 am
4	Deadline for Receipt of Proposal	Wednesday, March 13, 2024	4:00 pm
5	Deadline- RSVP for PRE-POSAL CONFERENCE via Email: Barbara.Robinson@catawba-aging.com	Friday, February 2, 2024	4:00 pm
6	Public Opening of Proposals	Tuesday, March 13, 2024	4:15 pm
7	Preliminary Evaluation Committee for Responsiveness by Staff	Friday, March 15, 2024	
8	Notification of Non-Responsiveness	Monday, March 18, 2024	
9	Distribution of proposals to the Evaluation Committee	March 18-20, 2024	
10	Initial meeting of the Evaluation Committee	Wednesday, March 20, 2024	
11	Deadline for evaluation committee and scoring of proposals by the Evaluation Committee	Wednesday, April 10, 2024	
12	Evaluation Committee and Develop Recommendations for Funding Successful Proposals to the Catawba Area Agency on Aging Board of Directors	Friday, April 12, 2024	11:00 am
13	Recommendation to Catawba Area Agency on Aging Board of Directors	Wednesday, April 17, 2024	11:00 am
14	Written Notification to all Proposers	Monday, May 15, 2024	
15	Contract Negotiations with an apparent successful offer	Wednesday, May 1, 2024	
16	Anticipated Contract Start	Monday, July 1, 2024	

PRE-PROPOSAL CONFERENCE - MANDATORY

The pre-proposal conference aims to ensure potential Offerors clearly understand the solicitation requirements. The AAA will accept questions and provide written answers that will be communicated to all eligible potential Offerors. This communication will be an amendment that becomes a part of the solicitation and any resulting contract(s).

Mandatory Requirements for Potential Offerors	
Location:	**York County Regional Chamber of Commerce** **116 E. Main St., Rock Hill, SC 29730**
Date and Time:	**February 6, 2024, at 10AM EST**
RSVP for Mandatory Pre-Proposal Conference needed for planning purposes:	**February 2, 2024, by 4:00 pm**
Organizations planning to attend must RSVP via email by 4:00 pm to:	**Barbara.Robinson@catawba-aging.com** **Subject Line: RFP#CATAWBA AAA 2024-MEALS**
All questions and/or requests for additional information regarding the RFP shall be submitted in writing to:	**Barbara J. Robinson** **Catawba Area Agency on Aging** **2051 Ebenezer Road, Suite B** **Rock Hill, SC 29732** **Phone: (803) 329-9670 Fax: (803) 329-9765** **Barbara.Robinson@catawba-aging.com**
All questions and/or requests for additional information regarding the RFP shall be submitted in writing by:	**January 31, 2024**

Appendix A

South Carolina
DEPARTMENT
ON AGING

Minimum Meal Specifications

Nutrition Program for Older Adults

REVISED 3-4-21

Minimum Meal Specifications

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Minimum Meal Specifications

Nutrition Program for Older Adults

OVERVIEW

The primary purpose of this program is to fulfill the requirements of the Older Americans Act, as Amended in 2020, by providing nutritionally balanced meals to strategically located centers that provide meals and socialization to eligible individuals.

It is estimated that there shall be approximately 249 serving days during each contract period. The period covered is from July 1, 2024 through June 30, 2025.

The food shall be delivered to sites designated within the specifications of this document. Food shall be packaged and maintained at specified temperatures according to state and federal regulations and guidelines (South Carolina Department of Health and Environmental Control (SCDHEC) and the U.S. Department of Agriculture (USDA). Proposers shall provide all vehicles, food-handling and transportation equipment, service ware, serving and eating utensils, cutlery, napkins, hot and cold cups, and other accessories required to serve a complete meal.

USEFUL RESOURCES

SCDOA Aging Services Policies and Procedures Manual

SCDHEC Retail Food Establishment- Regulation 61-25 (9/27/19)

Dietary Guidelines for Americans 2020-2025

USDA FoodData Central

A. Types of Meals

Refer to **[Attachment A – Requested Menu Types]** for the meal types and cycle length requested for this proposal.

1. **Regular Hot or Cold prepared meals:** may be delivered in bulk, daily to the sites by the proposer. These meals can be breakfast or main meals.
2. **Cold Bag/Box (or unnecessary to heat):** can be used as a daily meal, second meal of the day, a weekend meal, or for special circumstances. Individual components of the meals shall be individually portioned and wrapped as appropriate.
3. **Frozen meals:** pre-plated frozen meals combined with fresh or frozen supplemental foods to meet nutrient requirements. Frozen meals should include, at a minimum, preparation instructions and should be marked with use by dates.
4. **Shelf-stable meals:** composed of individually portioned foods that have been processed in such a manner as to be free of microorganisms capable of growth in the products at non-refrigerated conditions during distribution and storage. The packaging must be easy to open, clearly labeled, and include preparation instructions when needed. A multi-pack shall include menus to instruct participants on how to combine the foods to meet requirements. The box (or individually packaged items) should be clearly marked with a "use by" or "best by" date. Low sodium products should be used to the maximum extent when building shelf-stable meals due to the high sodium content of these types of products. Due to the nature of shelf-stable products, food items may be lacking in quality vegetables and protein, as well as several key nutrients, and therefore, are not appropriate for ongoing use. Shelf-stable meals may be used as **Emergency Meals**.
5. **Texture Modified meals:** may be hot or frozen and may be variations of the regular diet that are modified in food consistency, such as pureed or ground (minced and moist). etc.
6. **Diabetic:** a type of therapeutic meal that may be a variation of the regular diet and incorporates lean proteins, dietary fiber, healthy fats, and a consistent carbohydrate content. If this meal type is included in the proposal, provide a narrative describing your diabetic friendly nutritional standards.

- Meal types are to meet with the most recent Dietary Guidelines for American (DGA's) and Dietary Reference Intakes (DRI'S).
  [See pages 10-12: Section E: South Carolina Nutrition Services Requirements]
- On occasion, hot or cold meals may be served in a location other than the group dining meal site (such as for a special event or outing). The proposer shall agree to deliver the meals on the day of the event at the usual location or at another agreed upon location for the same price.
- Regular meals, Cold Bag/Box, Texture Modified, and/or Diabetic meals, they shall be proposed at the same price.
- Shelf-stable meals may be proposed at a separate price.
- For frozen meals with fresh supplemental foods, prices are requested for the following categories as indicated in **[Attachment A: Requested Menu Types]:**
  - Regular only; Regular, Texture Modified and Diabetic at the same price;
    - If equipment is provided, then installation, leasing, and maintenance of equipment shall be included); and pricing proposed on the basis of ordering the frozen component by complete case

B. Site Location and Meal Type Schedule

Refer to [**Attachment B – Meal Cost Schedule**] and [**Attachment C1 – Site Location and GROUP DINING Meal Type Schedule**]/[**Attachment C2 – Site Location and HOME-DELIVERED Meal Type Schedule**] for the type and number of meals requested at each location. The Site Location and Meal Type Schedule will determine the service area for the proposal. Proposals shall be submitted on the delivered price per type of meal, with disposables and beverages as applicable, and if requested, with equipment. The proposal shall conform to all the descriptions herein. Meals provided under this proposal are not subject to South Carolina State sales tax. The successful proposers may be requested to provide the same meals and services at the same price to additional sites.

Holiday closings: Meal sites served under this contract shall be closed for approximately *12* holidays during the contract year.

C. Required Information

[**Required Information Checklist on Page 13**]

1. **Letter of Transmittal**
2. **References**
3. **Understanding**
4. **Cost Proposal**
5. **Meal Cost Schedule [Attachment B]:** Provide the appropriate price per requested meal. The template provides the projected number and type of meal.

6. **Meal Cost Analysis Worksheet [Attachment D1]/[Attachment D2]:** Provide the percentage of the total cost of the meal for raw food, disposables, labor, delivery, equipment, and administration. If equipment is being provided, then installation, leasing, and the maintenance of such equipment shall be included. The price is based on the basis of ordering the frozen component by complete case lots.

7. **Location(s) Food Production Facilities [Attachment E]:** Provide information regarding vendor and food production facility location and delivery vehicle information (type and age). Attach additional sheets if needed. Include a copy of the most recent health department sanitation inspection (initial and follow-up reports); and/or USDA/FDA certification, if applicable shall be provided.

8. **Food Safety Inspection Report-** Provide the most recent health department food inspection report; if the most recent report is for a follow-up inspection, include the initial inspection report.

9. **USDA/FDA Certification for Frozen meal production facilities as needed**: Provide certification as appropriate. This requirement applies to out of state inspected food production facilities that are bringing meals **into** South Carolina (crossing state lines).

10. **Quality Assurance Procedures**: Provide a description of quality assurance procedures related to food quality and safety. At a minimum, include the following information:

Refer to **[Pages 8-9: SC Vehicle, Equipment, and Temperature Requirements]**
[Pages 10-12: SC Nutrition Services Requirement]

A. **Meal Order Accuracy:** Describe your process to ensure the correct amount of food is delivered each day.
B. **Food Quality:** Describe your organizational food purchasing/sourcing standards.
C. **Hazard Analysis Critical Control Points:** Include a process flow chart for quality assurance and or the Hazard Analysis Critical Control Point (HACCP) summary for production and handling of all meal types included in the proposal. Please include the required qualifications of the individuals who have overall responsibility of the food service quality control program.
D. **Description of Thermal Transport Equipment:** Delivery equipment that is designed to maintain safe food temperatures for allowed holding periods. Provide a description of the types and sizes of equipment, including brand name and quantity, used to transport daily-prepared, cold boxes/bags, and frozen meals. Explain how the equipment is monitored on a continuous basis to ensure proper function.
E. **Temperature Compliance:** Include recent (within three years or since equipment purchases) documentation of validation that the equipment and handling procedures are adequate to maintain food temperatures in accordance with SCDHEC requirements until portioning and serving time(s). The current required minimum holding temperature for heated food is 135 degrees °F and 41 degrees °F for cold foods. Frozen meals should be kept in a frozen solid state. After removal from electric or gas-powered temperature control, foods shall be held at proper temperatures for no more than four hours before serving.
F. **Example of daily meal delivery record:** Include forms with the times and temperatures for all time/temperature control for safety (TCS) foods. The time shall represent when the food was removed from temperature control (i.e. when foods were removed from a heating or cooling source). The daily meal delivery form shall have a place for the meal sites to document the time and temperature of TCS foods for up to four monitoring points (arrival, plating of home-delivered, prior to group dining service, and an optional point.)

11. **Proposed Route Schedule [Attachment F]:** Provide a packing and delivery schedule that includes the following information by route: total number of stops, length in miles, estimated travel time, and delivery times by site, based on the Site Location and Meal Type Schedule. The delivery schedule is to be compatible with requirements for food safety and minimize the amount of time food spends in transit.
12. **Proposed Menu Plan [Attachment G]:** Provide completed sample menu plans for each meal type and cycle length requested in Attachment A. ***If proposer submits a Regular Hot/Cold menu plan for bulk delivered meals, a Serving Guide must also be provided within the proposal. The proposer will provide cleaned and sanitized***

serving utensils with daily bulk delivered meals. The utensils are to provide the correct amounts of foods in accordance with the nutrient analysis or meal pattern. These utensils will be listed on the Serving Guide that accompanies the menu.

13. **SC Menu Checklist provided with each meal type proposed:** Complete South Carolina Menu Checklist (*Computer Analysis) **[Attachment H]** or South Carolina Guide for Menu Checklist (Meal Pattern) **[Attachment I]** by menu plan type.

    *For the nutrient analysis method, include the nutrient reports from the software program utilized to show source documentation.

14. **Meal Choice:** Provide a description as to how meal choice will be incorporated into the service provided. The menu choice is encouraged to allow for consumer choice and increase participant satisfaction. Choice Menus will comply with menu planning requirements. If more than one menu item is offered, the food item that has a lower nutrient value will be counted towards the weekly nutrient average when computer analysis is used. If a meal pattern approach is used, then both meals must meet the guidelines.

15. **Description of Meal and Beverage Service Equipment and Supplies:** Provide an itemized description of beverage and/or serving equipment and utensils, dishware, flatware, beverage cups, napkins, straws, and other accessories, and other supplies to be used for packaging home-delivered meals.

16. **Description and Expectations of Food Management Staff:** Provide a description of the current food management staff and any other staff who will be employed for this contract period. Include an organizational chart, job titles, educational and/or experience requirements, and staffing levels.

    Include specific roles and responsibilities for the managers, cooks, drivers, dietitians, etc. Provide verification of ServSafe Food Protection Manager Certification for Food Management staff. Registered Dietitians (either employed or contracted) are to ensure the integrity of the menu and nutrient analysis/meal pattern. Provide verification of Registered Dietitian licensure and registration status. Also, identify who will be the primary liaison as well as point of contact for each production facility.
    Annual training via Food Management Staff to be available at least annually and cover topics such as portion control, food safety, and proper care and cleaning of equipment or other related issues. Identify individual responsible for such training.
    Menu evaluation committee meetings shall be conducted on a quarterly basis. Identify 1-2 representatives for the evaluation committee. At least two weeks prior to the quarterly evaluation committee, the draft menu will be provided for the evaluation committee and to solicit feedback from clients.
    Must submit a copy of www.SAM.gov registration

17. **Description on Maximum Meal Production Load:** Provide information on the current total meal production load and the safe, maximum meal production load for each kitchen facility used to serve the contract. In addition, a brief statement that demonstrates the capability, based on past experience, to implement the nutritional

and logistical aspects applicable to the performance of the contract shall be included.

18. **Contingency Plans:** Provide a written plan for contingencies including, but not limited to, substitute driver availability, delivery of food in the event of vehicle breakdown, delivery of food in the event of an emergency at a production site, and method of reimbursement if replacement food must be purchased. Please include in your plan the length of time it will take to implement each of the examples above.

19. **Commencement of Services**
20. **Liability Insurance**
21. **Addendum(s) – Acknowledge addendum(s) if any**
22. **Other requirements**

D. South Carolina Vehicle, Equipment & Temperature Requirements

1. **General Requirements**
   All equipment and vehicles used in the preparation, transportation, service and delivery of food must have records of appropriate maintenance and meet the current requirements of the state and county health department. Equipment shall be classified or certified to listed NSF (National Sanitation Foundation)/American National Standards Institute (ANSI) Commercial Food Equipment Standards.

2. **Time and temperature control for safety (TCS) foods** shall be packaged and transported in closed thermal containers and enclosed vehicles in a manner that will maintain the required temperatures.

   If necessary, vehicles must be equipped with adequate facilities, automatic in operation and thermostatically controlled, for maintaining food at safe temperature requirements.

   The proposer shall provide support and necessary equipment for maintaining safe temperatures during the entire holding time for foods (until served or packed for delivery to the client). If delivered in bulk, food shall be packaged so that there will be a minimum of spills in the carrier. Measures may include monitoring fill level and covering pans with plastic film, aluminum foil, and/or metal lids. Foods for

   group dining and home-delivered meals may be packed together when it benefits compliance with food safety temperature requirements (i.e. less than 30 servings when using insulated carrier equipment). Thermal containers, etc. shall be provided in a size and/or quantity to contain all food delivered to the sites. Special care shall be taken in packaging cold food to prevent melting ice from contacting food.

The current required minimum holding temperature for heated food is 135 degrees °F and 41 degrees °F for cold foods. After removal from electric or gas-powered temperature control, foods shall be held at proper temperatures for no more than four hours before serving.

Daily records of the time and temperature of all potentially hazardous foods shall be maintained and provided upon request. Recorded information includes the time and temperature when the food was removed from temperature control (i.e. when foods were removed from a heating or cooling source). Temperature information shall be reported to each meal site on a daily basis. These records shall be kept for a period of three years.

The proposer shall provide at least one, properly calibrated dial or digital style thermometer to each site as well as provide instructions on re-calibrating the thermometers to ensure the accuracy of each.

Frozen meals must be stored at zero degrees °F. During transportation and delivery, the meals must remain solid to the touch. The proposer shall take any measure necessary to provide equipment and vehicles to ensure they remain in this state. If frozen meals are delivered with fresh or canned supplemental foods, these should be handled appropriately.

Equipment needed at dining sites to properly handle and prepare these meals may include chest freezers, prethermalization ovens/convection ovens, holding cabinets, and refrigerated units. Maintenance of this equipment, when provided by the proposer, shall be the responsibility of the proposer, but daily cleaning of the equipment shall be the responsibility of the meal site personnel.

3. **Beverage Equipment Requirements**
   Insulated beverage dispensers are to be used to keep beverages hot or cold. The capacity of the beverage holding equipment will be dependent upon the number of meals served at the site. Refer to Beverage Service with Meals.

4. **Supply/Equipment Responsibilities**
   As appropriate, daily meal delivery to include the provision of cleaned and sanitized serving utensils. Authorized designees are responsible for rinsing/removing food debris from equipment (utensils and serving pans, etc.); wiping any spills from thermal delivery containers; placing the rinsed and dry equipment into the delivery units and having it ready for pick up at the next delivery.

The proposer should have a method to ensure a working food thermometer is available for all days of service. Authorized designees are responsible for monitoring the operation of the supplied food thermometer and making timely requests for replacement when required.

Authorized designees are responsible for taking inventory and requisitioning paper supplies and edible items in a timely manner to ensure a perpetual inventory. Both parties shall rotate the inventory of any edible supplies to ensure freshness.

E. South Carolina Nutrition Services Requirements

1. Nutrient Requirements

Each Nutrition Program meal must comply with the Dietary Guidelines for Americans (DGA's)- 2020-2025 and provide to each participating individual: A minimum of 33 1/3 percent of the Dietary Reference Intakes (DRI's) per meal, if the project provides one meal per day. A minimum of 66 2/3 percent of the DRIs if the project provides two meals per day, and 100% of the DRIs if the project provides three meals per day.

2. Methods of Menu Compliance

Proposers must demonstrate compliance with the DGA's and DRI's by using **one** of the following documentation methods by meal type:

a. ***Computer Analysis*** - South Carolina Menu Guide Checklist **[Attachment H]**

Use of computer nutrient analysis software allows for increased menu planning flexibility. If the nutrient analysis method is used for menu compliance, it will supersede the meal pattern.

or

b. ***Meal Pattern*** - South Carolina Menu Guide Checklist **[Attachment I]**

This method is typically employed when there is no access to nutrient analysis software, but may also be selected for other reasons, such as ease of use when making substitutions.

Regardless of the method utilized, all standardized recipes and menus must be evaluated by a Registered Dietitian Nutritionist (include verification of Registration and Licensure status) to ensure compliance. The completion of the checklist and Registered Dietitian's final signature verifies that the corresponding signed menu is in compliance with the guidelines as set forth within this document.

3. Food Specifications

All food used in the preparation or service of meals shall be of high quality and meet any required standards and guidelines of the SCDHEC and the USDA. Food shall be from sources approved or considered satisfactory by the SCDHEC and USDA; shall be properly labeled; shall be free from spoilage, adulteration, and other contamination; and shall be safe for human consumption. No home-prepared or home-canned food is allowed.

The following minimum food standards must be met:

- Canned Fruits and Vegetables – USDA Grade A
- Fresh Fruits and Vegetables – #1 Quality
- Poultry – USDA Grade A or better
- Beef – USDA Choice or better; lean cuts should be selected and cooking methods that promote tenderness used
- Pork – USDA #1 or better; lean cuts should be selected and cooking methods that promote tenderness used
- Ground Meats (beef, pork, and poultry) shall not exceed 20 percent fat by weight
- Fish – all fish and seafood products shall be of comparable quality to USDA guidelines for beef and poultry.
- Eggs (or pasteurized eggs) – USDA Grade A or better
- Milk and milk products (fluid or dry) – pasteurized and USDA Grade A
- Salt – Iodized

4. Recipes & Menu Planning

All bidders, regardless of menu compliance method utilized, should refer to the Dietary Guidelines for Americans 2020-20205. See **[Attachment J]**.

Tested quantity recipes, adjusted to yield the number of servings needed, must be used to achieve consistent and desirable quality and quantity. Only actual recipe ingredients, that have been accurately identified, should be used in the menu approval process.

Successful bidders shall maintain a recipe file at each production site and provide copies of these recipes upon request. If the proposer provides meals from more than one production site, all production sites must use the same products and follow the same standardized recipes.

Foods must be selected, stored, and prepared to ensure maximum nutritional content. Specific attention should be given to batch cooking and short cooking times, minimizing the use of water in the preparation of vegetables, and minimal holding times for foods. No deep fat frying of foods is permitted.

When delivered, the food shall be appetizing, attractive in color and texture, lightly seasoned, and not greasy. Whenever possible, herbs and spices appropriate to the dish should be utilized to reduce the amount of sodium added to food preparation. Fats should be primarily from vegetable sources and in a liquid or soft (spreadable) form (polyunsaturated and monounsaturated fats) that are lower in partially hydrogenated fat (trans-fatty acids), saturated fat, and cholesterol.

Food items within the meat, vegetable, fruit, and dessert groups shall be varied within the week and not repeated on the same days of consecutive weeks. A variety of food attributes and combinations shall be considered in menu planning.
Religious, ethnic, cultural, or regional dietary requirements or preferences shall be reflected in the planned menus. Cycle menus should include the provision of seasonal foods.

5. **Beverage Service with Meals**

Dehydration is a common problem in older adults. Therefore, at a minimum, drinking water should be available with all meals.

- Milk is not a required beverage as long as calcium requirements are met.
- Other beverages, such as 100% fruit juices, may be served occasionally, as long as nutrient/meal pattern targets are met. Low nutritive value beverages that provide excess calories, such as fruit flavored beverages and sweetened drink mixes, should be avoided.
- Non-nutritive beverages (i.e. sugar-free drinks) do not help meet nutritional requirements but can help with hydration.

Optional Beverage Service: One optional beverage may be requested. The beverage option can be switched according to seasonal preference. The size of the urns and dispensers provided to each site shall be large enough to accommodate the number of group dining meals ordered for the site.

The following items, as appropriate, would be provided and included in the cost if optional beverage service is desired:

- Hot Beverage: urns, sugar, sugar substitute, creamer, six or eight ounce cups for hot liquids, and stirrers;
- Cold Beverage: dispenser, ice, unsweetened tea, sugar, sugar substitute, stirrers, and nine or ten ounce cups for iced tea.

Minimum Meal Specifications
Required Information Checklist

Proposers shall thoroughly examine all aspects of this Request for Proposals. All of the supplemental materials identified and requested in this section must be submitted and made a part of the Proposal.

Failure to submit any required information will be grounds for rejection of a Proposal.
Include this checklist.

☐	1. Letter of Transmittal
☐	2. References
☐	3. Understanding
☐	4. Cost Proposal
☐	5. Completed Meal (Cost) Schedule **[Attachment B]**
☐	6. Meal Cost Analysis Worksheets for included Meal Types **[Attachment D1][Attachment D2]**
☐	7. Location of Vendor and Food Production Facilities **[Attachment E]**
☐	8. Food Safety Inspection Report (include the most recent inspection report; if the most recent report is for a follow-up inspection, include the initial inspection report
☐	9. USDA/FDA Certification for frozen meal production facility, as needed
	10. Quality Assurance Procedures:
	☐ **A.** Meal Order Accuracy
	☐ **B.** Food Quality
	☐ **C.** HACCP program summary (personnel, processes, monitoring, frequency, & response)
	☐ **D.** Description of thermal transport equipment for various meal types
	☐ **E.** Temperature Compliance
	☐ **F.** Example of Meal Delivery Form
☐	11. Vendor Proposed Route Schedule **[Attachment F]**
☐	12. Proposed Menu Plans by meal type as requested in Attachment A **[Attachment G]**
	☐ Serving Guide as appropriate (bulk delivered meals)
☐	13. SC Menu Checklist Sheet for each meal type: Meal Pattern **[Attachment H]** or *Nutrient Analysis **[Attachment I]: *Include nutrient analysis report originating from software program as appropriate.** ☐ Narrative for Diabetic Meal nutritional standards as appropriate
☐	14. Meal Choice description

☐	15. Itemized description of meal and beverage service equipment and supplies
☐	16. Description of Food Management Staff ☐ Copy of www.SAM.gov registration ☐ ServSafe Food Protection Manager Certification ☐ Registered Dietitian verification of Licensure/Registration status
☐	17. Description of maximum safe meal production load and current production volumes for each production facility
☐	18. Contingency plans
☐	19. Commencement of Services
☐	20. Liability Insurance
☐	21. Addendum(s) – Acknowledge addendum(s) if any
☐	22. Other Requirements

ATTACHMENT A

REQUESTED MENU TYPES

Menu plans must be developed for the following menu types as checked:

☒ **Regular (Hot/Cold):** main meal menus for July, August, and September (4 week cycle, 5 days = 20 menus)

☒ **Cold Box/Bag:** menus for July, August, and September to include two meals for weekend days (2 week cycle, 7 days = 14 menus)

☒ **Frozen meals (with *frozen* supplements):** menus for July, August, and September (4 week cycle, 5 days = 20 menus)

☒ **Frozen meals (with *fresh* supplements):** menus for July, August, and September (4 week cycle, 5 days = 20 menus)

☒ **Shelf-stable/Emergency Meals:** non-perishable meal menus (1 week cycle, 5 days = 5 menus)

ATTACHMENT B

MEAL COST SCHEDULE

Region: _____ **Date:** _____

MEALS	QUANTITY PER YEAR	COST PER MEAL	COST PER MEAL PLUS OPTIONAL BEVERAGE
REGULAR			
COLD BOX/BAG			
FROZEN- with *Frozen* Supplements			
FROZEN- with *Fresh* Supplements			
SHELF-STABLE			

NOTE: Using **[Attachment D1 & D2 – Meal Cost Analysis Worksheet],** the proposer shall provide a breakdown of the cost of group dining meals and home-delivered meals (Regular-Hot/Cold, frozen, and/or shelf-stable) using the forms provided. The breakdown shall provide the percentage of the total cost of the meal for raw food, disposables, labor, transportation/delivery, and administration.

ATTACHMENT C1

SITE LOCATION AND GROUP DINING MEAL TYPE SCHEDULE

REGION: _____ DATE: _____

PROVIDER: _____

Site & Location	Regular (Hot/Cold)	Frozen with *Frozen* supplements	Frozen with *Fresh* supplements	Cold Box/Bag	Shelf-stable	Delivery Time

***Specify Texture Type- "Pureed", "Ground", etc.**

ATTACHMENT C2
SITE LOCATION AND HOME-DELIVERED MEAL TYPE SCHEDULE

REGION: _____ DATE: _____

PROVIDER: _____

Site & Location	Regular (Hot/Cold)	Frozen with *Frozen* supplements	Frozen with *Fresh* supplements	Cold Box/Bag	Shelf-stable	Delivery Time

***Specify Texture Type- "Pureed", "Ground", etc.**

ATTACHMENT D1

MEAL COST ANALYSIS WORKSHEET – Daily Prepared (Regular, Cold Box/Bag)

On the worksheet below, provide the **percentage** breakdown of the meal components listed.

Regular, Cold Box/Bag MEALS

Meal Cost Component	**Percent of Total**
1. Raw Food Cost	_____
2. Disposable Meal supplies (serve-ware, cutlery, napkins, glassware)	_____
3. Beverage Service	_____
4. Labor	_____
5. Equipment (thermal transport)	_____
6. Transportation/Delivery - Labor	_____
7. Transportation/Delivery – Equipment	_____
8. Administrative Expense	_____
9. Nutrition Education (if included in contract)	_____
TOTAL (should equal 100%)	_____

ATTACHMENT D2
MEAL COST ANALYSIS WORKSHEET – Frozen and Shelf-Stable

On the worksheet below, provide the **percentage** breakdown of the meal components listed.

FROZEN MEALS

Meal Cost Component	**Percent of Total**
1. Raw Food Cost (**frozen**)	_____
2. Raw Food Cost (fresh supplemental foods as applicable)	_____
3. Labor	_____
4. Equipment (thermal transport)	_____
5. Transportation/Delivery - Labor	_____
6. Transportation/Delivery – Equipment	_____
7. Administrative expense	_____
8. Nutrition education (if included in contract)	_____
TOTAL (should equal 100%)	_____

SHELF-STABLE MEALS

Meal Cost Component	**Percent of Total**
1. Raw Food Cost **(shelf-stable)**	____
2. Raw Food Cost (fresh supplemental foods as applicable)	____
3. Labor	____
4. Equipment	____
5. Transportation/Delivery – Labor	____
6. Transportation/Delivery – Equipment	____
7. Administrative expense	____
8. Nutrition education (if included in contract)	____
TOTAL (should equal 100%)	____

ATTACHMENT E: LOCATION OF PRODUCTION FACILITIES

PROPOSER:	
OFFICE ADDRESS:	
PHONE:	
CONTACT:	

	LIST OF PRODUCTION FACILITIES	***DATE OF MOST RECENT INSPECTION**	**GRADE**
1.	Address:		
	Phone:		
	Manager:		
	Description, number, and age of vehicles:		
2.	Address:		
	Phone:		
	Manager:		
	Description, number, and age of vehicles:		
3.	Address:		
	Phone:		
	Manager:		
	Description, number, and age of vehicles:		

*Copies of the most recent sanitation inspection (and/or USDA/FDA certification, if applicable) for each production facility must be attached. If the most recent inspection was a follow-up inspection, the initial inspection that required the follow-up inspection must be provided.

ATTACHMENT F
PROPOSED ROUTE SCHEDULE

Date: _____

Name of Route: _____ Is this a Contract Dedicated Route? Yes/No

Total Number of Stops on Route: _____ Number of Non-contract Stops: _____

Use one page per route. Add pages as needed. Indicate non-contract stops using "Stop 1", "Stop 2", etc.

Do not complete travel time and delivery window for non-contract stops.

Estimated Route Start Time:		
Sites Names in Delivery Order	**Estimated Travel Time***	**Window for Delivery Time**

TOTAL ESTIMATED AMOUNT OF TIME FOR ROUTE: _____

*** Estimated travel time includes period from start time and all stops prior to the delivery of any particular meal site.**

ATTACHMENT G: MENU PLAN _____

CYCLE:_____ WEEK #:_____

Day	Monday	Tuesday	Wednesday	Thursday	Friday
Month, Day					
Protein or Alternate					
Vegetable					
Fruit					
Grain					
Milk or alternate					
Dessert (optional)					
Beverage (optional)					

Analysis Weekly Avg.		**Nutrient Analysis Daily Values** [leave section below blank if utilizing meal pattern]									
Kcal	Pro%	Kcal	Pro%	Kcal	Pro%	Kcal	Pro%	Kcal	Pro%	Kcal	Pro%
Fat%	Carbs%	Fat%	Carbs%	Fat%	Carbs%	Fat%	Carbs%	Fat%	Carbs%	Fat%	Carbs%
Vit C (mg)	Carbs (gm)	Vit C (mg)	Carbs (gm)	Vit C (mg)	Carbs (gm)	Vit C (mg)	Carbs (gm)	Vit C (mg)	Carbs (gm)	Vit C (mg)	Carbs (gm)
Vit B12 (mg)	Na (mg)	Vit B12 (mg)	Na (mg)	Vit B12 (mg)	Na (mg)	Vit B12 (mg)	Na (mg)	Vit B12 (mg)	Na (mg)	Vit B12 (mg)	Na (mg)
Vit B6 (mg)	Vit A (µg)	Vit B6 (mg)	Vit A (µg)	Vit B6 (mg)	Vit A (µg)	Vit B6 (mg)	Vit A (µg)	Vit B6 (mg)	Vit A (µg)	Vit B6 (mg)	Vit A (µg)
Fiber (gm)	Ca (mg)	Fiber (gm)	Ca (mg)	Fiber (gm)	Ca (mg)	Fiber (gm)	Ca (mg)	Fiber (gm)	Ca (mg)	Fiber (gm)	Ca (mg)
	K (mg)		K (mg)		K (mg)		K (mg)		K (mg)		K (mg)

Prepared by: _____ **Effective date:** _____ to _____

I certify that these menus meet the nutrition requirements as specified in the SCDOA Meal Specifications for compliance with the *DGA-1/3 DRIs*.

_____ _____

Registered Dietitian Nutritionist RDN License Number

ATTACHMENT H:

SOUTH CAROLINA MENU CHECKLIST
Computer Analysis
SCDOA Nutrient Requirements and Values for Analysis

For menus that are documented as meeting the nutrient requirements through nutrient analysis software, this form must be completed and signed by the Registered Dietitian.

Menu Cycle

Name/Months/Year:_____

NUTRIENT	Daily Target Values (Represent 1/3 of daily DRI)	Compliance Values Averaged over 1 week	Weekly Average Criteria Met ☒			
			Week 1	Week 2	Week 3	Week 4
Calories (Kcal)	>/= 600 calories	625-850	☐	☐	☐	☐
Protein (% of meal calories)	>/= 15% of total calories	> 15% of total calories	☐	☐	☐	☐
Fat (% of meal calories)	Less than (<) 35% of total calories	20-35% of total calories	☐	☐	☐	☐
Carbs (% of meal calories)	45-65% of total calories	45-65% of total calories	☐	☐	☐	☐
Fiber (gm)	>/= 9 gm*	9 gm	☐	☐	☐	☐
Vitamin A (µg)	300 micrograms* or 1000 I.U.	300 micrograms or 1000 I.U.	☐	☐	☐	☐
Vitamin C (mg)	30 milligrams*	30 milligrams	☐	☐	☐	☐
Vitamin B6 (mg)	0.57 milligrams*	0.57 milligrams	☐	☐	☐	☐
Vitamin B12 (µg)	0.79 micrograms*	0.79 micrograms	☐	☐	☐	☐
Calcium (mg)	400 milligrams*	400 milligrams	☐	☐	☐	☐
Sodium (mg)	</= 1100 milligrams*	1100 milligrams	☐	☐	☐	☐
Potassium (mg)	1133 milligrams*	1133 milligrams	☐	☐	☐	☐

*When adhering to DRI requirements, some target values may vary from the daily target value listed as long as the weekly Compliance Value Average is met. The Compliance Value Average is to allow for menu flexibility and client satisfaction. Please note that some nutrients such as calories and protein should meet Target Values daily. No individual meal should be less than 600 calories.

To increase menu variety, slight increases in the one-third (1/3) DRI minimums for fat and sodium may occur twice per menu cycle: sodium must not exceed 1400 milligrams and fat shall not exceed 35%.

Prepared by: _____

I certify that these menus meet the nutrition requirements as specified in the Meal Specifications and that the corresponding computer nutrient analysis indicates compliance with the *DGA-DRIs*.

_____ _____

Registered Dietitian Nutritionist RDN License Number

ATTACHMENT I:
SOUTH CAROLINA MENU CHECKLIST
Meal Pattern

If nutrient software is not used, each meal will follow the meal pattern described in this section.

Instructions: A food item in one or more food groups can only be classified once as meeting the requirement for a meal. For example: cottage cheese can be counted as a Milk/Milk alternative *or* a Lean Protein source, not both.

Nutrient-rich desserts that include fruit, whole grains, and low-fat milk can count toward meeting the appropriate food group required servings.

Meal Pattern					
FOOD GROUP OR SUBGROUP	**Amount when 1 Older Adult Nutrition Program Meal is served per day**	**Criteria Met** ☒			
		Week 1	Week 2	Week 3	Week 4
Vegetables	2 servings per meal	☐	☐	☐	☐
Dark-Green Vegetable	1 serving/week	☐	☐	☐	☐
Red & Orange Vegetable	1 serving/week	☐	☐	☐	☐
Beans, Peas, Lentils	1 serving/week	☐	☐	☐	☐
Starchy Vegetable	1 serving/week	☐	☐	☐	☐
Other Vegetables	1 serving/week	☐	☐	☐	☐
Fruits	1 serving per meal	☐	☐	☐	☐
Grains	1-2 servings per meal	☐	☐	☐	☐
Whole Grains	2 servings/week	☐	☐	☐	☐
Dairy and Alternates	1 serving/meal	☐	☐	☐	☐
Protein Foods	2-3 oz (equiv.) per meal	☐	☐	☐	☐
Processed meat	Max. 1 serving/week	☐	☐	☐	☐
Vitamin A- good sources ◆	3 servings/week	☐	☐	☐	☐
Vitamin C- good sources ◆	3 servings/week	☐	☐	☐	☐
Fresh Fruits/Vegetables	3 servings/week	☐	☐	☐	☐
Dessert	Optional	☐	☐	☐	☐
Beverage	Optional	☐	☐	☐	☐

Prepared by: _____

I certify that these menus meet the nutrition requirements as specified in the SCDOA Meal Specifications for compliance with the *DGA-1/3 DRIs*.

_____ _____

Registered Dietitian Nutritionist RDN License Number

ATTACHMENT J - Dietary Guidelines for Americans 2020-2025

The Dietary Guidelines translate the nutrient quantitative requirements or limits – known as Dietary Reference Intakes (DRI) – into food and beverage recommendations. The information within this section provides the framework for healthy menu planning practices for the older adult nutrition program. Using the nutrient analysis method for menu compliance supersedes the meal pattern method.
https://www.dietaryguidelines.gov/sites/default/files/2020-12/Dietary_Guidelines_for_Americans_2020-2025.pdf

USDA FoodData Central: https://fdc.nal.usda.gov/

Meal Pattern		
FOOD GROUP OR SUBGROUP	**Amount when 1 Older Adult Nutrition Program Meal is served per day**	**Recommendations and Notes**
Vegetables	2 servings per meal	A fruit serving may be substituted for a vegetable serving.
Dark-Green Vegetable	1 serving/week	A serving from each vegetable subgroup must be served **at least once per week**.
Red & Orange Vegetable	1 serving/week	
Beans, Peas, Lentils	1 serving/week	
Starchy Vegetable	1 serving/week	
Other Vegetables	1 serving/week	
Fruits	1 serving per meal	Serve fresh, canned, and dried more often than juice to increase fiber
Grains	1-2 servings per meal	Whole grains should be served at least **twice per week.**
Whole Grains	2 servings/week	
Dairy and Alternates	1 serving/meal	Products selected should be mostly fat-free and low-fat options.
Protein Foods	2-3 oz (equiv.) per meal	Lean protein sources should be emphasized. Beans and peas may be used as a protein source, but may not count as both a protein and a vegetable in the same meal. Processed meats (higher in fat and sodium) should be served a maximum of 1 time per week.
Processed meat	Max. 1 serving/week	
Vitamin A- good sources◆	3 servings/week	Refer to Vegetable and Fruit categories on next pages for good sources of Vitamin A and C. A single fruit or vegetable may count as both a source of vitamin A and C for the week.
Vitamin C- good sources◆	3 servings/week	
Fresh Fruits/Vegetables	3 servings/week	Fresh fruits/vegetables shall be served at least three times a week. Fresh means not frozen or canned.
Dessert	Optional	Should come from existing food groups such as fruit, grain, and milk groups
Beverage	Optional	Water, Tea, Coffee in addition to those listed in other food groups

Vegetables

Vegetables may be raw or cooked; fresh, frozen, canned, or dried/dehydrated; and may be whole, cut-up, or mashed. Canned vegetables are usually high in sodium; low sodium varieties are available and are encouraged. *Fresh* vegetables (not canned or frozen) provide additional fiber.

Nutrients provided include potassium, dietary fiber, and vitamin A ◆& C◆, potassium, calcium, and B vitamins amongst others.

Vegetable Serving Sizes:

½ cup cooked, drained fresh, frozen, canned or raw
1 cup leafy raw vegetable (lettuce, spinach, etc.)
½ cup (4 oz) 100% tomato or vegetable juice (low sodium preferred)

Vegetables are organized into 5 subgroups based on their nutrient content: Dark-Green, Red & Orange, Beans, Peas and Lentils, Starchy, and Other.

Vegetable Subgroups	
Dark-Green *Forms: Fresh - Frozen – Canned*	**Red & Orange** *Forms: Fresh - Frozen - Canned*
Bok Choy (cooked◆) Broccoli◆ (cooked◆) Chard◆ Collard greens◆ (cooked◆) Escarole◆ (cooked◆) Kale◆ (cooked◆) Mesclun Mustard greens◆ (cooked◆) Romaine lettuce◆◆ Spinach◆ (cooked◆) Turnip greens◆ (cooked◆) Watercress◆	Acorn squash◆◆ Butternut squash◆◆ Carrots (raw or cooked◆) Carrots and Peas◆ Pumpkin◆ (cooked◆) Red◆ or Orange Bell Pepper Sweet potatoes◆◆ Tomatoes◆◆ 100% Tomato Juice◆◆
***Beans, Peas, Lentils** *Forms: Cooked from dry – Canned*	**Starchy Vegetables** *Forms: Fresh - Frozen - Canned*
Black beans Black-eyed peas Edamame Garbanzo beans (Chickpeas) Kidney beans Lentils Lima beans (mature) Baked Beans Navy beans Pigeon Peas Pinto beans Soy beans Split peas Tofu (bean curd made from soybeans) *subgroup does not include green beans or green peas	Corn Green peas◆ Lima beans (green◆) Potatoes◆ Rutabagas◆ Yams
◆ **Vitamin A sources,** ◆ **Vitamin C sources**	
Vegetable Subgroups	

Other *Forms: Fresh - Frozen – Canned*	
Artichokes Asparagus◆ Avocado Beets Brussels sprouts◆ Cabbage (green◆, red◆, napa, savoy) Cauliflower◆ Celery Cucumbers Eggplant Green beans◆ Green peppers◆	Iceberg (head) lettuce Mushrooms Okra◆ Onions (raw◆) Parsnips Radicchio Snow Peas◆ Summer Squash◆ Turnip◆ Wax beans Zucchini
	◆ Vitamin A sources, ◆ Vitamin C sources

Fruits

Meals should include a variety of fruits—whether fresh, frozen, canned, pureed, or dried—rather than fruit juice for most of the fruit choices. When canned fruit is served, it must be in water or 100% juice—not light or heavy syrup. *Fresh* fruits (not canned or frozen) provide additional fiber.

Nutrients provided include potassium, dietary fiber, and vitamin A ◆& C◆

<u>Fruit Serving Sizes:</u>

½ cup of cooked, frozen, or canned, drained fruit
¼ cup dried fruit
Medium piece of fresh fruit (banana, pear, orange, apple, etc.)
1/2 cup (4 oz) of 100% fruit juice
15 grapes

Fruits *Forms: Fresh – Frozen – Canned – Dried*			
Apple (raw◆) Apricot◆ Asian pear Banana◆ Blackberries (raw◆) Blueberries (raw◆) Cantaloupe◆◆ Cherries◆ Citrus Juice◆ Dates	Figs Fruit Juices (100%) Guava (raw◆) Grapes Grapefruit◆ Honeydew melon◆◆ Kiwifruit◆ Mandarin Oranges◆◆ Mango◆◆	Nectarine◆◆ Orange◆ Papaya◆◆ Passion Fruit Peach (frozen & raw◆) Pear◆ Pineapple (fresh or canned◆) Plantain Plum◆◆	Prunes◆ Raisins Raspberries◆ Rhubarb Star fruit Strawberries◆ Tangerine◆ Watermelon◆◆
			◆ Vitamin A sources, ◆ Vitamin C sources

Grains

Grains are divided into two subgroups, whole grains and refined grains.

- **Whole grains** contain the entire grain kernel – the bran, germ, and endosperm.
  - Provide a higher fiber and potassium content
- **Refined grains** have been milled, a process that removes the bran and germ.
  - ***Enriched grains***- B vitamins (thiamin, riboflavin, niacin, folic acid) and iron are added back in after processing. Fiber is not added back in.

Grain serving sizes:

1 slice (1 oz) of bread
½ cup cooked rice
1 biscuit (2 inch diameter)
1 small muffin (2 oz)
Cornbread (2" cube)
½ large hotdog/hamburger bun (1 oz)
4-6 Crackers (1 oz)– saltine type

3/4 cup (1 oz) of ready-to-eat-cereal
½ cup cooked cereal (grits, oatmeal)
½ cooked pasta (noodles, macaroni, spaghetti)
½ bagel/English Muffin (1 oz)
1 tortilla, 6" diameter
½ cup bread dressing/stuffing
2 pancakes, 4" diameter
1 waffle, 7" diameter

NOTE: Limit use of breads that are relatively high in fat such as biscuits, muffins, cornbread, & dressings.

Grain Subgroups	
Whole Grains	**Refined Grains**
All whole-grain products and whole grains used as ingredients: amaranth, barley (not pearled), brown rice, buckwheat, bulgur, millet, oats, popcorn, quinoa, dark rye, triticale, whole-grain cornmeal, whole-wheat bread, whole-grain multi-grain bread, whole-wheat chapati, whole-grain cereals and crackers, and wild rice.	All refined-grain products and refined grains used as ingredients: white breads, refined-grain cereals, and crackers, corn grits, cream of rice, cream of wheat, barley (pearled), masa, pasta, and white rice. Refined-grain choices should be ***enriched***.

Dairy or Alternates

What foods are included:

All fluid, dry, or evaporated milk, including lactose-free and lactose-reduced products and fortified soy beverages (soy milk), buttermilk, yogurt, kefir, frozen yogurt, dairy desserts, and cheeses. Most choices should be fat-free or low-fat. Cream, sour cream, and cream cheese are not included due to their low calcium content.

Nutrients provided include calcium, vitamin A, vitamin D, and potassium amongst others.

Dairy/Alt. serving sizes:

1 cup (8 oz) milk

- skim, 1%, low-fat chocolate or buttermilk (higher in sodium), lactose-reduced, lactose-free, calcium fortified soy/rice/almond milk (fat free or 1%/flavored)

½ cup (4 oz) evaporated milk
1 cup (8 oz) yogurt- fruited or non (a 4-6 oz container represents as ½ - ¾ of a serving)
1/3 cup non-fat dry milk powder
½ cup calcium processed tofu
1 ½ ounces hard cheese (cheddar, mozzarella, Swiss, parmesan)
1/3 cup cheddar cheese
2 ounces processed cheese (American)- higher in sodium
½ cup ricotta cheese- higher in sodium
1 cup pudding made with milk- higher in sugar
Note: Most dairy choices should be fat-free or low-fat (use skim or 1% milk).

Protein

All foods made from meat, poultry, fish, dry beans and peas, eggs, processed soy products, nuts, and seeds are considered part of this group. Dry beans and peas are also part of the vegetable group. If being used in the protein category of the meal pattern, it may not count as a vegetable in the same meal.

Ounce equivalents:

1 ounce of meat, poultry, or fish (excluding breading, bones)
1 egg
½ ounce of nuts or seeds
¼ cup of tofu
2 Tbsp hummus
¼ cup cooked dry beans or peas
2 Tbsp peanut butter
¼ cup tuna
¼ cup roasted soybeans

Note: Breading does not count towards meeting the serving requirement (nor the grain).

Protein Subgroups		
Meat, Poultry, Eggs	**Seafood**	**Nuts, Seeds, Soy Products**
Common meat selections include beef, liver, and pork. Poultry includes chicken and turkey. Eggs include chicken eggs and other birds' eggs. Meats and poultry should be lean or low-fat. **Processed meats (high in sodium and saturated fat) may be served a maximum of 1 x's weekly:** Bologna Canned, pressed luncheon meat Corndogs Hot dogs Pepperoni Polish Sausage	Common seafood include sea bass, catfish, cod, flounder, haddock, hake, pollock, salmon, sardine, sole, tilapia, light tuna, and whiting.	Nuts and seeds include all nuts (tree nuts and peanuts), nut butters, seeds (e.g., chia, flax, pumpkin, sesame, and sunflower), and seed butters (e.g., sesame or tahini and sunflower). Soy includes tofu, tempeh, and products made from soy flour, soy protein isolate, and soy concentrate. Nuts should be unsalted.

Sodium

The Dietary Guidelines recommends moderate sodium (e.g. salt) intake, and therefore the SCDOA Menu Policies have established target sodium content per meal, maximum values per menu cycle as well as weekly averages. To assist in determining if food products meet the sodium limits, please refer to the chart below, and evaluation committee the Protein Foods section. Foods should be flavored with herbs and spices instead of salt.

Food and Drug Administration Regulations for Low Sodium Labeling Terminology

Terms	Sodium Amount
"Sodium Free"	Less than 5 milligrams per serving
"Very low sodium"	35 milligrams or less per serving
"Low sodium"	140 milligrams or less per serving
"Reduced Sodium"	Usual sodium level is reduced by 25%
"Unsalted, no-salt-added, or without added salt"	Made without the salt that is normally used, but contains the sodium that is a natural part of the food itself.

Oils

Oils are important to consider as part of a healthy dietary pattern as they provide essential fatty acids. Acceptable oil use for food preparation includes canola, corn, olive, peanut, safflower, soybean, and sunflower oils. Oils also are naturally present in nuts, seeds, seafood, olives, and avocados. Meals preparation should avoid the use of butter, shortening, lard, coconut oil, palm kernel oil, and palm oil (contain a higher percentage of saturated fat than do other oils).

1 serving is equivalent to:

- 1 Tablespoon vegetable oil or margarine
- 1 Tablespoon mayonnaise
- 2 Tablespoons low-sodium salad dressing
- 2 Tablespoons peanut butter
- ½ medium avocado
- 1 oz (1/4 cup) nuts or seeds

Condiments

Encourage herbal seasonings, lemon, and vinegar to provide flavor without sodium. Limit foods high in sodium. Condiments include items on the side like salad dressing, ketchup, mustard, relish packets, etc. If part of the planned meal, these items should be included in the meal pattern or nutrient analysis.

Desserts

Recommend fruit for dessert to decrease added sugar consumption. Nutrient-rich desserts that contain fruit, whole grains, and low-fat milk products are encouraged.