



STEP BY STEP GUIDE FOR SENIOR NUTRITION PROGRAMS SEEKING TO WORK WITH FOOD RETAILERS (RESTAURANTS AND GROCERY STORES-FOR MEALS)

Senior nutrition programs (SNPs) 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. SNPs continue to engage with older adults in need, serve new audiences, strive to maintain competitiveness, and offer increased meal choice to their clients. Partnering with food retailers proves an important opportunity to leverage the thousands of pounds of surplus perishable foods available within local food systems, available to be turned into meals for senior nutrition program participants.

Collaborations with food retailers can serve as 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.

There is a longstanding tradition of SNP leaders making great strides in this area. However, for SNPs that have not engaged in such collaborations in the past, the prospect of launching a new initiative might be daunting. Being familiar with the Older Americans Act (OAA) Nutrition Program and its requirements, is essential to develop and guide a partnership with a food retailer. Similarly, food retailers like grocery stores and restaurants, may not be familiar with the [Older Americans Act Nutrition Program and the requirements for this program](#). Information on the [Older Americans Act](#) is readily available online.

Since 2017, the Administration for Community Living (ACL) has funded a cadre of SNPs 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 aged 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 OAA. The primary responsibilities which the Department has under the OAA, and New York State Community Services for the Elderly Programs focus on planning, advocacy, and coordination activities.

ABOUT THEIR INNOVATION PROJECTS

- 2017, *Collaborating with Community Partners on a Congregate Meal Delivery Model in Iowa 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.
- 2018, *Increasing Choice Through a Flexible, Technology-Driven Meal Program in New York* 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 Models](#) in Nutrition Programs and Services.

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.

Part 2: Identify the expertise your team needs:

- Restaurant/grocery management/food service/catering experience;
- In-depth understanding of the [OAA Nutrition Program](#);
- Knowledge of public health, food safety, emergency preparedness;
- Knowledge of the local restaurant and food retail landscape;
- Experience partnering with [a diversity of] community leaders and community-based organizations;
- 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?
- Use the [Quick Guide to Working with Restaurants and Grocery Stores](#) to introduce the project to the planning team

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.).
- Identify target population(s) of interest for this initiative including low-income/minority populations, persons residing in rural settings, and persons with low English proficiency/immigrants/refugees, as well as persons at risk of institutional care.
- Visit the [Nutrition and Aging Resource Center Cultural Competency web page](#) for resources on approaches and opportunities to serve diverse populations.

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/food service operations.
- Engage 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.
- Establish a physical visit or a virtual tour of local restaurants in target communities to review facilities, engage directly with staff and identify opportunities to partner.

Step 3: Identify a cohort of potential vendors

- Issue a Public Notice, Request of Proposals, or other public notification, per local guidance / specifications, outlining partnership opportunity, overview of program and programmatic goals. Depending on your specific organization and operating environment, other approaches such as a Request for Bid or Project Announcement may be more applicable.
- Contact restaurants identified in the environmental scan that serve meals within the desired price point and those willing to agree to a mutually beneficial price.
- Look to find vendors that serve key target populations. [Communicate the benefits](#) of being a meal provider to potential partners. This may involve using community partners to find vendors have the expertise to meet the nutritional needs of your target population.

Step 4: Review data collected, select and contract with identified vendor

- Collaborate with your identified food retail partner and negotiate a mutually beneficial contract for your collaboration.
 - [Contracting Tips for Purchasing Meals](#)
- Share the following resources with your identified vendor to ensure they have a broad understanding of how best engage with your SNP
 - [Nutrition Requirements of the OAA](#)

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. The contract with the identified vendor can include one or more options: using a meal voucher or other payment system for dining in or take-out from the food retailer, delivery of meals to meal sites or clients at their homes, or allowing a designated loved one to pick up meals for the program participant. Contracts should allow for a revisiting of protocols to make any needed adjustments and to ensure practices align with your State and local public health policies.
 - Note: Meal voucher or electronic meal card programs are not the same as offering a [gift card](#). Instead, meal vouchers and electronic meal cards are ways that SNPs can arrange for food retailers to record meals eaten by the seniors in a confidential manner.
- Market this new partnership to your clients through varied media channels. Ask the food retailer to market the new collaboration in a way that will reach the target audience.

Key Questions to Inform Your Partnership Planning Process:

- Who should be on your team? What expertise should they have?
- Who is your target client or your target population? Where do they live, what do they need? What barriers to participation might they be confronting?
- What are the contracting process barriers 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) and keep the transaction confidential?
- How will you accept participant donations? See the [Voluntary Contributions Menu](#) and more information at the [Nutrition and Aging Resource Center Finances web page](#).
- How will you assure the vendor establishes an appropriate system to support tracking and reconciling client participation records?
- Is contactless delivery of meals to clients needed and how will the vendor implement this?
- How will a variety of menus that include cultural or regional specialties be made available for clients to select from? How will nutrition requirements be met?
- How will you message and market your program so that your target clients understand how the program works? Be sure to manage client expectations.
- The sustainability of the initiative – how will you ensure that the partnership lasts?
- What price range for the meal are you willing to target? How does this price range stack up against the pricing of local 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, key nutrient targets, sample consent forms, participation requirements such as the need to participate in surveys to evaluate programmatic outcomes, confidentiality, 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 monthly.

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.
- Repeatedly ask 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 vendor or 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 When Collaborating with a Restaurant or Grocery Store Partner:

- During the negotiation and contracting process, design meals within context of what the vendor can offer – be sure to identify food items that are easy for the vendor to obtain to meet menu requirements. Use the [Menu Creation Toolkit](#) and [Nutrition Guidelines Quick Tips](#) for examples and resources.
- Consider seeking out people with the following job titles when working with restaurants and grocery stores: store director, catering director, in-store registered dietitian nutritionist (RDN), banquet manager.
- Understand potential and actual limitations of restaurant or grocery store partner - be mindful that they are: potentially new to the OAA and may need targeted technical assistance.
- Create an orientation presentation for your food retailer partner to introduce them to the requirements of the OAA 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
- Create menus that are appealing to the targeted population.
- 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).
- Meet regularly with the selected vendor like any other subcontractor. Meetings need to be frequent in the beginning 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. [Sample Flyer](#)
- Create marketing materials that are clear and specific to ensure understanding of the partnership by target population.
- Co-create a checklist for grocery store, restaurant employees and volunteers to orient them to their various roles. [Sample checklist](#)

SAMPLE POLICY AND PROCEDURES

The OAA is written to allow for State and Local administered programs. Therefore, State and Local organizations 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](#)

Erie County Department of Senior Services

- [REUMERATION SCHEDULE](#)
- [CONTRACT TERMS AND CONDITIONS LANGUAGE](#)
- [CUSTOMER SATISFACTION SURVEY](#)