Network for a Healthy California—African American Campaign

Faith Projects Guidelines Manual

This material was produced by the California Department of Public Health, *Network for a Healthy California*, with funding from the USDA Supplemental Nutrition Assistance Program (formerly the Food Stamp Program). These institutions are equal opportunity providers and employers. In California, food stamps provide assistance to low-income households, and can help buy nutritious foods for better health. For food stamp information, call 877-847-3663. For important nutrition information, visit www.cachampionsforchange.net.

Network for a Healthy California—African American Campaign

Faith Projects Guidelines Manual

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I. Introductory Section

This material was produced by the California Department of Public Health, *Network for a Healthy California*, with funding from the USDA Supplemental Nutrition Assistance Program (formerly the Food Stamp Program). These institutions are equal opportunity providers and employers. In California, food stamps provide assistance to low-income households, and can help buy nutritious foods for better health. For food stamp information, call 877-847-3663. For important nutrition information, visit www.cachampionsforchange.net.

I.	INTRODUCTORY SECTION
100.	Introduction

This Chapter includes:

101. *Network for a Healthy California*
102. *African American Campaign*
103. Faith Projects
104. Funding Source
105. Funding Schedule
106. Target Audience & Income Eligibility Guidelines

101. *Network for a Healthy California*

The *Network for a Healthy California* (*Network*) is a comprehensive statewide social marketing initiative whose mission is to create innovative partnerships that empower and enable low-income Californians, especially families with children, to eat the recommended amounts of fruits and vegetables and enjoy physical activity every day. At the state level and through 11 *Regional Networks*, the *Network* partners with nearly 1,000 public, non-profit, and business organizations that want to work together to promote good health, eliminate health disparities, and prevent chronic diseases such as obesity and heart disease. Funding is made possible from the contributions of public and nonprofit organizations that qualify for federal financial participation reimbursement through the USDA Supplemental Nutrition Assistance Program (SNAP, formerly the Food Stamp Program). Visit www.networkforahealthycalifornia.net to learn more about the *Network* or www.cachampionsforchange.net for consumer information. The *Network* is led by the California Department of Public Health's Cancer Control Branch and is administered in part by the Public Health Institute.

To effectively serve and to work in partnership with Californians eligible for SNAP-Education (SNAP-Ed), the *Network* has identified the Social Ecological Model as its scientific underpinning. Within the context of USDA SNAP-Ed Plan Guidance requirements, the *Network* programs promote positive change for healthy eating and physical activity in five spheres of behavioral influence that impact dietary and physical activity behaviors: individual, interpersonal, institutional/organizational, community, and social/policy/systems.

The *Network*'s targeted social marketing campaigns, including the *African American Campaign*, are designed to reach low-income Californians where they live, shop, learn, work, worship, and play. In addition to changing individual behaviors, they also help organizations and individuals become Champions for Change to make fruit and vegetable consumption and physical activity easy to do and socially supported.

102. *African American Campaign*

The *Network for a Healthy California—African American Campaign* empowers African American adult women, ages 18-54, and their families to consume the recommended amounts of fruits and vegetables and get the recommended levels of physical activity every day—adults should do 2 hours and 30 minutes a week of moderate-intensity

physical activity; children and adolescents should do 1 hour (60 minutes) or more of physical activity every day.

Currently, the *African American Campaign* operates in 6 of 11 *Network for a Healthy California* regions (www.networkforahealthycalifornia.net/rn) to reach African Americans through faith organizations, supermarkets, direct health service providers, and a wide variety of community-based organizations. Public relations activities, nutrition education and consumer empowerment initiatives, and public and private partnerships support the interventions to make healthier choices, easier choices for African American families. The six regions are listed below, with the priority counties for the *African American Campaign* underlined:

- Bay Area Region: Alameda**,** Contra Costa**,** Marin, San Francisco**,** San Mateo, an Santa Clara counties
- Central Valley Region: Fresno**,** Kern, Kings, Madera, Mariposa, Merced, and Tulare Counties
- Desert Sierra Region: Inyo, Riverside, and San Bernardino counties
- Gold Country Region: Alpine, Amador, Calaveras, El Dorado, Mono, Placer, Sacramento, San Joaquin, Solano, Stanislaus, Sutter, Tuolumne, Yolo, and Yuba counties
- Los Angeles Region: Los Angeles County
- San Diego & Imperial Region: San Diego and Imperial counties

Studies have shown that eating the recommended amounts of fruits and vegetables and engaging in regular physical activity significantly reduces the risk of serious health problems plaguing the African American community, such as obesity, type 2 diabetes, heart disease, stroke, and certain types of cancer. The African American community is often disproportionately affected by diet-related chronic diseases and food security issues, as indicated by these statistics:

- In total, 76 percent of African American adults in California are overweight or obese, as compared with 59 percent of the total adult population.[1]
- Cardiovascular diseases (CVD) rank as the number one killer of African Americans, claiming the lives of 35 percent of the more than 292,000 African Americans who die each year.[2]
- Among African Americans in California, 12 percent reported they had been diagnosed with diabetes, which is 1.7 times the rate of white Californians.[3]
- Seventeen percent of Food Stamp recipients in California are African American,[4] although African Americans comprise only 6.7 percent of the total California population.[5]

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[1] Behavioral Risk Factor Surveillance System Survey Data: 2007 [Unpublished data file]. Sacramento, CA: *Network for a Healthy California*, Policy, Partnership, and Planning Section; Cancer Control Branch; California Department of Public Health.

[2] Kung, C.H. et al. (2008) *National Vital Statistics Reports: Deaths: Final Data for 2005*. Division of Vital Statistics. Center for Disease Control and Prevention. Retrieved April 07, 2009, from, http://www.cdc.gov/nchs/data/nvsr/nvsr56/nvsr56_10.pdf (Tables 3,12)

3 California Health Interview Survey-Ask CHIS 2007. Retrieved April 07, 2009, from http://www.chis.ucla.edu/

4 California Department of Social Services. Food Stamp Information based on Q5 data for FFY2007 http://www.dss.cahwnet.gov/foodstamps/PG844.htm

5 US Census Bureau, California State and County Quick Facts, 2007 http://quickfacts.census.gov/qfd/states/06000.html

Additional health statistics on African Americans are available on the Web site at: http://www.cdph.ca.gov/programs/cpns/Pages/AfricanAmericanHealthStatistics.aspx. In order to improve the health of African Americans, strategies for educating adults and youth through research, faith-based education programs, community health fairs, media, and public and private partnerships are being implemented.

103. Faith Projects

The *Network* recognizes African American churches as one of the strongest institutions within the African American community for providing education and generating community change. The rates of chronic disease in the African American community may be decreased through education and behavior change supported by health ministries working to improve the overall health and quality of life of African Americans. Surveys conducted by the *Network* have shown that churches are listed among the top five places where African Americans want to receive education on nutrition and physical activity. Faith-based health ministries are an important service to the African American community, helping individuals and families learn about and act upon the links between the high rates of chronic disease among African Americans and poor health habits, particularly low fruit and vegetable consumption and sedentary lifestyles.

The *Campaign* offers resources, including funding, research-based educational materials, technical assistance, coordination, and training, to funded non-profit faith associations to build on their established networks and empower their church members' congregants to provide a stronger voice for their community in the areas of healthy eating and physical activity. The ultimate goals are to:

- Enable African American churches reaching large numbers of low-income persons to provide vital skills training to individuals and families to eat the recommended amounts of fruits and vegetables and get the recommended levels of physical activity every day;
- Stimulate change in attitudes, knowledge, and behavior among social groups (e.g., churches, service organizations, educators, youth groups) and businesses serving the African American community (e.g., food retailers, sports, entertainment, health providers); and
- Promote self-efficacy and encourage social norms that support family, organizational, and community decisions to adopt healthy behaviors and environments.

104. Funding Source

This project is funded by the United States Department of Agriculture Supplemental Nutrition Assistance Program – Education (SNAP-Ed, formerly Food Stamp Program) through the *Network for a Healthy California*, an initiative of the California Department of Public Health. It is being administered by the Public Health Institute (PHI). These institutions are equal opportunity providers and employers. Through this guidelines manual these funds may also be referred to as CDPH funds.

SNAP-Ed is a federal/state partnership that supports nutrition education for SNAP participants and persons eligible for the SNAP. Eligible (primarily public) entities that

choose to conduct nutrition education through their SNAP are eligible to be reimbursed for up to one-half of their SNAP-Ed costs by the USDA Food and Nutrition Service (FNS). SNAP-Ed funded agencies reach intended audiences by coordinating with state and local partners, and with other contractors. The list of "other" contractors includes, state public health departments, food banks, tribal programs, local health organizations, and one-thousand resource schools.[6]

PHI is an independent, nonprofit organization dedicated to promoting health, well-being and quality of life for people throughout California, across the nation, and around the world. As one of the largest and most comprehensive public health organizations in the nation, PHI is at the forefront of research and innovations to improve the efficacy of public health statewide, nationally, and internationally. PHI works with the *Network for a Healthy California* of the California Department of Public Health to administer the faith Projects' contracts.

105. Funding Schedule

The *Network* will fund Faith Projects at an annual maximum award of $150,000 per project, or $487,500 over a 39-month period. Specific award amounts are based in part upon the number of churches and number of people that the awardees serve. The initial contract term shall be from July 1, 2009 to December 31, 2009 in order to maintain alignment with PHI's contract with the California Department of Public Health. Funding for this six-month period can be as high as $75,000 per contractor. Awardees will be eligible for an additional contract term from January 1, 2010 through September 30, 2012, contingent upon funding availability and successful performance of the subcontracting organization. Funding for the *African American Campaign* Faith Projects is contingent upon the continued availability of funds through USDA SNAP, and subject to USDA SNAP-Ed Plan Guidance requirements at http://www.cdph.ca.gov/programs/cpns/Documents/Network-SNAP-EdGuidance-2009-01.pdf and Network Allowable and Unallowable Costs guidelines (see Fiscal Section).

106. Target Audience & Income Eligibility Guidelines

The USDA SNAP-Ed audience is comprised of certified and likely-eligible SNAP participants (with incomes at or below 130 percent of the Federal Poverty Level) and potentially-eligible participants (with incomes at or below 185 percent of the Federal Poverty Level). (See Section III - Administrative Section, 700, for a detailed description of 2009 Poverty Guidelines.) The USDA requires *Network*-funded projects to document that over 50 percent of their audience meets these income criteria. Audience income eligibility is confirmed through the use of census tract or census block data identifying their demographic (income and ethnicity) make-up (See http://www.cnngis.org/ for the *Network*'s Geographic Information System, which provides the required census tract and census block data). Additional sites may be approved by the USDA with appropriate documentation that the audience is income-eligible; such as, through an approved survey of church congregants or their participation in other programs serving low-income Californians.

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[6] USDA Cooperative State Research, Education, Extension Service. Retrieved August 27, 2009
http://www.csrees.usda.gov/nea/food/fsne/about.html
http://www.csrees.usda.gov/nea/food/fsne/fsne.html

I.	INTRODUCTORY SECTION
200.	Fact Sheets

This Chapter includes:

201. Map of *Network for a Healthy California—African American Campaign Regional Networks*
202. African American Health Statistics (Fact Sheet)

201. Map of *Network for a Healthy California—African American Campaign Regional Networks*

http://www.cdph.ca.gov/programs/cpns/Documents/Network-AA-RegionMap.pdf

202. African American Health Statistics

G:\CPNS_COMMUNICATION & MEDIA\Publications\African American Campaign\Health Statistics 2009\African American Health Statistics_Final_070209.pdf

I.	INTRODUCTORY SECTION
300.	Contact Lists

This Chapter includes:

301. *Network for a Healthy California—African American Campaign* State Contacts
302. *Regional Networks*

301. *Network for a Healthy California—African American Campaign* State Contacts

You can send mail to us at:

California Department of Public Health
Network for a Healthy California
P.O. Box 997377, MS 7204
Sacramento, CA 95899-7377

You can send shipping/overnight express (UPS, FedEx, etc.) to:

California Department of Public Health
Network for a Healthy California
1616 Capitol Avenue, Suite 74.516
MS 7204
Sacramento, CA 95814

Main Phone Number
916-449-5400

Fax us at:
916-449-5414

Here is how you can reach our team:

For Strictly Fiscal Matters:

Laura O'Neill
916-327-8267
Laura.ONeill@cdph.ca.gov

Dennis Derenzy
916-449-5383
Dennis.Derenzy@cdph.ca.gov
(Dennis to be contacted in the event Laura O'Neill is unavailable)

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Asbury Jones
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Angela Dennis
916-552-9928
Angela.Dennis@cdph.ca.gov

302. *Regional Networks*

http://www.cdph.ca.gov/programs/cpns/Pages/AfricanAmericanRegContacts.aspx

I.	INTRODUCTORY SECTION
400.	Dates to Remember

This Chapter includes:

401. Important Deadlines

401. Important Deadlines

10/15/09 Using the provided Activity Tracking Form, develop a database of all eligible and potentially-eligible church sites within the association that serve African American families at 185% of the Federal Poverty Level and are located within regions where the *Network for a Healthy California—African American Campaign* operates.

10/30/09 Using the provided SOW Implementation Plan template, submit a one-year plan for implementing the SOW activities, including methods and coordination with local, regional, and state organizations.

10/30/09 Using the provided Progress Report template, indicate the completion status for each objective and activity in the Scope of Work. Please see the Faith Guidelines Manual, Administrative Section, mini-chapter 103 for a detailed explanation of acceptable terms for completing this document.

II. Fiscal Section

This material was produced by the California Department of Public Health, *Network for a Healthy California*, with funding from the USDA Supplemental Nutrition Assistance Program (formerly the Food Stamp Program). These institutions are equal opportunity providers and employers. In California, food stamps provide assistance to low-income households, and can help buy nutritious foods for better health. For food stamp information, call 877-847-3663. For important nutrition information, visit www.cachampionsforchange.net.

II.	FISCAL SECTION
100.	Budget Justification Instructions

This Chapter Includes:

101. Instructions for completing the Budget Justification
102. Budget Line Item Definitions/Information

101. Instructions for completing the Budget Justification

A Budget Justification must be submitted for each budget period that your organization is funded to implement an *African American Campaign* Faith Project.

The budget justification template is available in Excel and can be downloaded from the Web site at http://www.cdph.ca.gov/programs/CPNS/Pages/AACampaignRFA.aspx**.**

1. List your organization's legal name in the footer at the bottom left of each page.
2. Round off dollars and percentages to the nearest whole number.
3. Use the Budget Justification to reflect your budget amounts. If the space provided for the required information is not sufficient, you can modify the rows to add additional information as needed. (e.g.: additional personnel titles and information). When adding rows or columns to the Excel form please make sure and format the cells, rows and/or columns added.
4. Use a calculator to check total calculations. Do not rely on formulas.
5. Enter Budget items for each of the Budget Justification lines.
6. Space allocation, equipment, and non-program related travel must be prorated by FTE when staff person is not dedicating 100% FTE to the *Network* contract. If costs are required to be prorated, please provide the basis of the prorating. Example: Project Coordinator is 75% on budget; rent for the space occupied by the Project Coordinator must be prorated based on the FTE. The *Network* would only reimburse for 75% of the rental costs. If staff is on reduced time base, but dedicated 100% to the *Network* with no other funding source for salary and benefits, prorating is not required.

102. Budget Line Item Definitions/Information

Contractors should verify with their appropriate fiscal staff that the following *Network* line item definitions are compatible with their internal line item definitions. Accommodations may be made with the *Network* to place expenses in alternative line items to facilitate accurate invoicing. If needed, such accommodations should be requested by the contractor during contract negotiations and prior to finalizing the budget justification. All budgetary expenses must meet **SNAP-Ed** http://www.cdph.ca.gov/programs/cpns/Documents/Network-SNAP-EdGuidance-2009-01.pdf. The *Network* also provides an **Allowable and Unallowable Costs** http://www.cdph.ca.gov/programs/cpns/Documents/CPNS-I300AllowableandUnallowableCosts.pdf that lists examples of reasonable costs that are allowable under SNAP-Ed guidelines.

A. **Personnel Salaries:** Describe and justify staffing information for each position budgeted. Contract employees or consultants should not be included in this line item. Include all of the following information:

- Name - Enter the employee name(s). If there are more than 8 staff per classification, indicate “multiple staff” and the total number of staff in parenthesis. A list of names is not needed, but should be available upon request.

- Position Title - Enter the employee’s “generic title”. This should be one of the titles found on the list of USDA-approved generic position descriptions found in the Budget Justification form.

- If the generic title differs from the employee’s official title, list the official title in parenthesis next to the generic title.

- Note: using USDA-approved generic titles and generic position descriptions is not mandatory, but is recommended.

- If a position is not filled, indicate “vacant”.

1. **Annual Salary**:
   Enter the annual salary used for each employee. When converting a monthly, semi-monthly, weekly or hourly salary to an annual salary please use the standard 52 week year at 2080 hours/year to make the calculation. Calculations should be based on actual salaries.

2. **Total Full Time Equivalent (FTE) Allocated to *Network* Contract**
   Enter the FTE each employee will spend on allowable *Network* activities (e.g., 20 hours of a 40-hour week equals .50 FTE). Please note: Enter this as a decimal not a percentage. (The FTE should be carried to four decimal places).

3. **Percentage FTE Time for Administrative Duties Allocated to *Network* Contract**
   Estimate the percentage of time for each employee that is spent on administrative duties. (The percent of time entered for Administrative Duties + the percent of time entered for Direct Delivery should add up to the percentage of FTE for each position listed.) Please enter as a percentage (i.e., 50% rather than a decimal - .50 FTE).

   Administrative Duties are expenses related to personnel positions that perform administrative duties (e.g., processing purchase orders, preparing invoices, collecting weekly time logs, and performing general clerical duties, such as answering phones, ordering supplies and preparing correspondence, etc.).

4. **Percentage FTE Time for Direct Delivery Duties Allocated to *Network* Contract**

   Estimate the percentage of time for each employee that is spent on direct delivery or programmatic duties. (The percent of time entered for Administrative Duties + the percent of time entered for Direct Delivery Duties should add up to the percentage of FTE for each position listed.) Please enter as a percentage (i.e. 50% rather than a decimal - .50 FTE).

Direct Delivery Duties are expenses related to personnel positions directly engaged in service/program delivery (e.g., nutrition education classes and promotions, food stamp promotion, food demonstrations, community outreach activities, physical activity promotion, nutritional aspects of gardening, etc).

The *Network* is implementing this requirement using the following methodology: if the majority of the activities for the staff person are administrative, i.e. an accounting assistant, then place all that person's FTE allocated to the *Network* contract under "Administrative Duties", if the person is working as a Project Coordinator, place that person's FTE allocated to the *Network* contract under "Direct Delivery Duties". This methodology must be applied consistently in order to meet USDA's requirement.

Example: if a person is working as a Project Coordinator and dedicating .5 FTE, this should be reflected as 50% Direct Delivery Duties in column # 5. If the person is working as an Administrative Assistant and dedicating .75 FTE, this should be reflected as 75% Administrative Duties in column #4.

Note: The percentages listed under columns 4 (% Administrative Duties) and column 5 (% Direct Delivery Duties) should equal the FTE listed for each employee(s). For example, if a nurse is budgeted at .25 FTE, then we should see 25% listed in the Direct Delivery Duties column for that row. Similarly, if 10 nutrition educators are budgeted for a total of 2.5 FTE, we should see 250% in the Direct Delivery Duties column for that row.

5. **Budget Total Dollars**
For each employee, calculate the total amount of dollars allocated. Annual Salary (column 2) multiplied by Total FTE (column 3) = Total Dollars (column 6).

Position Description
Include a brief description of each employee's duties and responsibilities as they relate to allowable nutrition education and physical activity promotion to SNAP-Ed eligibles. There is a list of generic position descriptions approved by USDA in the Budget Justification form.

Next to each position description title, include the corresponding number(s) in parenthesis from each staff listed under the Personnel Salaries line item that the position description applies to. Please remove any position descriptions that are not applicable to your organization. If none of the generic position descriptions apply, add a short position description. The order of personnel listed in the Personnel Salaries line item should correspond directly with the list of position descriptions. The *Network* recommends the use of these generic position descriptions as well as inserting the actual organization staff title in parenthesis next to the generic position description.

B. **Fringe Benefits:** Fringe Benefits may include expenses such as statutory benefits, a comprehensive benefits package, or other benefits (e.g., medical, dental, vision coverage, long-term disability, accidental death insurance, and a tax-sheltered annuity program). Benefits may be calculated using various rates depending on

individual factors. List the type of fringe benefits included in the Fringe Benefit rate. Indicate the fringe benefit percentage used for calculating the fringe benefit line.

C. **Operating Expenses:** Identify the major areas of operating expenses and provide a detailed cost breakout of these expenses. The detailed cost breakout should include the basis for the calculation. Example: Postage $505 -1000 stamps at 50.5 cents each for nutrition newsletter to SNAP-Ed eligibles). Operating expenses should be prorated based on the FTE dedicated to SNAP-Ed. Please indicate the percentage by which you are prorating the expense. Operating Expenses include expenses for routine items such as office supplies, communications (telephone, facsimile, e-mail), postage, overnight mail, routine printing and duplication, and space-rent/lease (include formula for calculating space costs). Indicate the total operating expenses in the Budget column. (Note: Non-routine and one-time types of expenses should be budgeted under the "Other Costs" line item.)

D. **Equipment Expenses:** Describe and itemize any equipment expenses and indicate the staff assigned to the equipment. Equipment is defined as non-expendable property used to conduct eligible nutrition education activities, and includes items such as computers, televisions, VCRs/DVDs, cameras, typewriters, furniture, etc. If your equipment will not be used exclusively for allowable *Network* activities or by a 100% FTE, then the expense must be prorated by FTE to include only the portion related to nutrition education. If prorating, please indicate the percentage by which you are prorating the expense and the staff the equipment is assigned to. The % FTE for the staff must match the prorated % of the cost. Indicate the total equipment expenses in the Budget column. Please see Chapter 500 of this Fiscal Section for more information about Equipment Purchases.

E. **Travel and Per Diem Expenses:** For each trip, include personnel title and FTE of person(s) traveling, dates of travel, purpose of trip as it pertains to SNAP-Ed scope of work, location, and approximate cost. The approximate cost should include an expense breakdown for registration, hotel, mileage, meals, parking, etc. Indicate the travel and per diem expenses in the Budget column. The reimbursable State Department of Personnel Administration (DPA) mileage rate is 55 cents per mile. Travel and Per Diem expenses included on the Budget may be no greater than the current DPA rates as outlined at http://www.dpa.ca.gov/jobinfo/statetravel.shtm .

Staff from your organization should budget for the training opportunities required in Objective 7, Activity 5 of the Scope of Work. The mandatory and optional trainings and meetings described in the activity do not need to be prorated.

Prorate all non-*Network* sponsored travel and per diem by the percentage of FTE for all personnel traveling and again by the percentage of allowable nutrition education and physical activity promotion included in the trip agenda. All non-*Network* sponsored conference/trainings must be prorated, require state approval and are subject to further justification by contractor staff including objective/purpose as it pertains to SNAP-Ed scope of work. Please see supplemental Form #4C – Non-*Network* Sponsored Travel Request. For non-*Network* sponsored conferences, *Network* staff will determine the amount to prorate based on content once the agenda has been published and will forward this information to *Network* contractors. All out-of-state travel requires prior approval from the USDA Western Regional Office and the Public Health Institute. Please see Chapter 400 of this Fiscal Section for more information about Travel and Per Diem

F. **Subcontracts:** The Subcontractor line is to include both subcontractor and consultant costs (click here to see guidelines for Subcontractors). The following information must be provided for the Budget:

- Subcontractor name (if known); list as "TBD" if not known;
- Brief description of services to be provided;
- Basis for the Cost - approximate number of consulting hours and/or days to perform the deliverable that will be contracted for and the hourly/daily rate; and
- Total costs.

If consultant services are budgeted, provide the following details:

- Consultant name; list as "TBD" if not known;
- Brief description of services to be provided;
- Basis for the Cost - approximate number of consulting hours and/or days to perform the deliverable that will be contracted for and the hourly/daily rate; and
- Total costs.

Subcontractor/Consultant budgets and budget justifications will be reviewed and approved during contract negotiations with *Network* staff. If the subcontractor/consultant has not been determined, submit the required subcontract information to the *Network* as soon as the agreement is negotiated with contractor but prior to execution, so that *Network* staff can review and approve the subcontract for compliance with USDA, CDPH, and PHI regulations. As required by USDA, prior written authorization is required for all subcontracts. No subcontractor expenses will be paid by the *Network* to the agency unless a fully executed copy of the subcontract has been submitted to the *Network* for review and approval. Attach the subcontractors' budget justification and brief project description as part of the application.

G. **Other Costs:** This line item includes non-routine, occasional, or one-time expenses such as publications, training, nutrition education materials, and food (for demonstration/taste testing purposes only). Identify the major areas of expense and provide a brief cost breakout of these expenses. Indicate the other costs expenses in the Budget.

H. **Indirect Costs:** Indirect Costs are defined as expenses not directly or exclusively associated with the project's deliverables such as overhead or allocated expenses. Examples of overhead or allocated expenses include: administrative personnel, bookkeeping, payroll services, janitorial services, insurance, and audit expenses. Describe briefly the expenses associated with this line item. Calculations should be based on rates as indicated below. Please submit documentation from your fiscal department that supports how the indirect rate was determined and calculated.

- The indirect rate used to calculate this line item should be your organization's standard indirect rate. If your organization has a federally negotiated indirect cost rate, this must be used.

- If your indirect costs are based on a modified amount, please identify what expenses are not included in your calculations to arrive at your total Indirect Costs amount; and

- For colleges and universities: Since most services take place off-campus, the off-campus rate is considered most appropriate to use. Only if the majority of the nutrition education activities are conducted on campus can the on-campus rate be allowed.

I. **Total Expenses:** Enter the sum of line items A through H to reflect total expenses.

II. FISCAL SECTION
200. Reimbursement Process

This Chapter Includes:

201. General Information
202. *Network* Invoices
203. Invoices with Subcontract Expenses
204. Invoices with Equipment Expenses
205. Mailing Documents
206. Payment Time Frames
207. Supplemental Documents
208. Invoice Processing Guidelines
209. Final Invoice
210. Address Changes

201. General Information

The following process applies to *African American Campaign* Faith Projects seeking reimbursement under a contract with the Public Health Institute (PHI). A contract must be fully executed before invoices can be processed. Prompt and consistent reporting helps to ensure that a contractor will not experience a delay in payment. Contractors must provide the assigned Contract Manager (CM) with all payment process information detailed in this Guidelines Manual to ensure timely reimbursement.

202. *Network* Invoices

The invoice, addressed to Public Health Institute at the *Network for a Healthy California (Network)*, must be based on actual expenses incurred within the month specified on the submitted document and must be based from the contractor's approved Budget Justification or Budget Adjustment Request (BAR). Expenses claimed for activities must be substantiated by supporting documentation as described in Subsection 300, Fiscal Documentation. The *Network* requires that supporting documentation be kept on file for a period of three years after the end of the contract term and submitted for review when requested. Payment of invoices is contingent upon compliance with these documentation requirements.

203. Invoices with Subcontract Expenses

When an invoice contains expenses related to a lower-tier subcontract agreement that exceeds $5,000, the *Network* must review the agreement **before** reimbursement of those expenses can be made. If the agreement has not been approved prior to expenses being claimed, the *Network* may withhold payment of the invoice subcontract line item amount until a copy of the agreement is received and approved.

204. Invoices with Equipment Expenses

When an invoice contains expenses in the equipment line item, a Contractor Equipment Purchased with CDPH Funds Form must be submitted to the CM in order for the invoice to be processed. If the form has not been submitted, invoice processing will be delayed.

Monies not spent by the end of the Budget Periods ending September 30 of each year cannot be carried over to the next Budget Period.

Please see Subsection 500 for additional information about reimbursements for computers and equipment purchases.

Following are due dates for submitting invoices:

Invoices submitted on a monthly basis are due 30 days after the end of the reporting period with the exception of the final invoice for the budget year, which is due 60 days after the end of the contract period.

205. Mailing Documents

When mailing invoices, and all other contract-related materials, please use one of the following addresses:

Overnight mail is the preferred method for delivery, using the following address:

Laura O'Neill
Public Health Institute
California Department of Public Health
c/o *Network for a Healthy California*
1616 Capitol Avenue, MS-7204
Sacramento, CA 95814

If sending via regular mail:

Laura O'Neill
Public Health Institute
California Department of Public Health
c/o *Network for a Healthy California*
Mail Station 7204
P.O. Box 997377, Suite 74.516
Sacramento, CA 95899-7377

Note: Regular mail can take up to two weeks for delivery.

206. Payment Time Frames

PHI/*Network* staff attempts to review, approve, and forward an invoice to Accounting for payment within 5-10 working days from receipt. If there are problems with the invoice, PHI/*Network* staff will contact the Contractor either by telephone or in writing during this period. All invoices are processed on a first-come, first served basis.

207. Supplemental Invoices

Supplemental Invoices are necessary when expenses incurred during a given month were not included on a previously submitted invoice. For example, in January, a Contractor incurred an additional $150 in Operating Expenses during October that was not included on the October invoice previously submitted. Contractors are not to include this additional expense on a subsequent invoice. Contractors **must** submit a

Supplemental Invoice claiming **only the additional expense** and clearly label the invoice as "Supplemental" in the heading next to the invoice period. Cumulative expenses on Supplemental Invoices should include all expenses incurred on all prior invoices submitted to-date.

208. Invoice Processing Guidelines

Contractors can help prevent delays in invoice processing by following these guidelines:

1. If in doubt, Contractors should contact the assigned CM regarding questions or potential problems **before** submitting an invoice. This will help prevent errors and delays in processing and payment.
2. The invoice must have **original** signatures using a pen color other than black ink. Do not use black ink to sign the documents because black ink often resembles a photocopied signature.
3. Do not use whiteout or correction tape. To correct errors, draw a line through the incorrect amount or information (e.g., address), initial each change and enter the correct amount or information next to it. If the corrections will increase the invoice total, a new invoice must be submitted.

209. Final Invoice

The *Network* will withhold payment of the Contractor's last monthly invoice for the contract period until the Final Report and other contract deliverables have been received and approved by the Program Manager (PM).

Final invoices should be submitted for payment no more than 60 calendar days following the final reporting period or the contract expiration/termination date unless the Contractor has obtained prior written approval from the *Network* for an alternate deadline date. The following form should be included with the final invoice:

- Inventory/Disposition of CDPH-Funded

A final Invoice may or may not be the last monthly invoice. For example, a final invoice may be a Supplemental Invoice that captures expenses that were not included in invoices from prior months. Remember to mark the final invoice with an "X" next to "Check for Final Invoice Contract Term" on the top of the invoice form.

210. Address Changes

Contractors are required to submit written notification to the *Network* of any changes in the organization's address. Contractors should submit a revised Contractor Information Form via email for any of the following changes.

1. Change of Address and/or Phone Number.
2. Change of Project Coordinator or Primary Contact Staff.
3. Change of Fiscal Staff.
4. Change of Email Address.
5. Change of Contract Signatory.

II.	FISCAL SECTION
300.	Fiscal Documentation/Record Keeping

This Chapter Includes:

301. General Information
302. Required Supporting Documentation

301. General Information

USDA requires all Network Contractors to maintain accurate, detailed records of expenditures associated with the program for at least three years. Equally as important, Contractors must be able to verify the source of funds used to pay for these expenditures.

The *Network* will periodically review documentation to ascertain an organization's adherence to the fiscal documentation requirements of the contract agreement. Prior to the review, the assigned CM will send the Contractor a letter of notification and identify the period that will be chosen for review.

302. Required Supporting Documentation

When requested, a Contractor will be required to submit one copy of all source documentation associated with the selected invoice. Contractors are required to separate, batch, and label each set of documentation according to the line item (i.e., operating expenses) to which the expense is billed and to which fiscal documentation report it pertains. All documentation that is batched for each line item must equal the total amount reflected for that line item. Please see Forms 2 through 6, in the "Appendix: Forms" section of this Guidelines Manual for more information on fiscal documentation.

If the Contractor's accounting system is capable of generating reports that contain detailed expenditure object codes to record actual expenses for qualifying nutrition education activities, those reports may be submitted in lieu of a calculator tape, electronic spreadsheet, or a summary page. If a Contractor submits computer-generated reports, the Contractor needs to provide a key for the expenditure object codes that have been designated. The Contractor should highlight the expenses and indicate to which report they pertain.

Source documentation should include, but is not limited to the following documentation for each of the line items A - H. Please batch and label the documentation according to the following line items.

A. **Personnel Salaries:** Documents must be based on actual expenditures and include:

1. **Time records** - computer or manual reports/ledgers documenting personnel expenses that include percent of time/number of hours, actual salary, etc.
2. **Payroll registers**.

3. **Weekly Time Logs**, and Semi-Annual Certification Forms (see Section 500) – documentation of time spent on qualifying nutrition education activities:

   - Staff who are budgeted for **less than 100%** of their time on nutrition education and physical activity promotion must provide signed, Weekly Activity Logs.
   - Staff who are budgeted for **100% of their time** on nutrition education must provide a signed Duty Statement form describing time spent on nutrition education activities and are required to have Semi-Annual Certificate of Activity form signed and on file.

B. **Fringe Benefits:** Records of actual expenditures associated with fringe benefits and a list of items billed under this line item.

C. **Operating Expenses:** Vendor invoices, bills, or receipts for all operating expenses that were originally listed under this line item in the budget justification. If any operating expense (i.e. space, rent, phones, etc.) is being charged, also provide a formula on how the amount billed was calculated or prorated if the expense is shared with other programs.

D. **Equipment Expenses:** Vendor invoices, bills, or receipts for all equipment purchases that were originally listed under this line item in the budget justification. Any equipment that has been purchased must also be recorded on the Contractor Equipment Purchased with CDPH Funds form.

E. **Travel and Per Diem:** Travel and Per Diem Support Schedule and travel expense claims, receipts, bills, or invoices for items that were originally listed under this line item in the budget justification. Keep the following points in mind when completing and processing travel expense claims:

   1. Travel expense claims must reflect the traveler's name and title or classification, start and end date, time of travel, and a travel description.
   2. PHI/*Network* contracts require that travel expenses for approved scope of work activities adhere to the state standard travel reimbursement rates established by the Department of Personnel Administration (DPA) as described in the Travel Reimbursement Information Exhibit within the contract.
   3. Travel reimbursement rates apply to those travelers identified in the approved budget justification.

F. **Subcontracts: Lower-tier** subcontractor expenses should be documented with invoices, bills, or receipts for all costs claimed. In addition, provide subcontract and consultant agreement(s) that have not previously been submitted for any subcontractors and/or consultants that have been paid. These agreements must include the subcontract/consultant cost, term, and deliverables, as well as required terms and conditions. Note: Prime Contractors are responsible to ensure subcontractors adhere to all PHI/*Network* contract requirements. For additional information please see mini-chapter 402 (Funding Application Requirements for Subcontracts) in the Administrative Section of this manual:.

G. **Other Costs:** Vendor invoices, bills, or receipts for items that were originally listed under this line item in the budget justification.

H. **Indirect Costs:** Records of actual expenditures associated with indirect rates (including vendor purchase orders for outside services such as utilities, janitorial, payroll, bookkeeping, legal, etc.) and a list of items billed under Indirect Costs.

II.	FISCAL SECTION
400.	Travel and Per Diem

This Chapter Includes:

401. General Information
402. Excess Lodging Approval
403. Mileage Reimbursement

401. General Information

Prior written approval is required for all travel conducted through the contract unless the travel was pre-approved during the contract negotiation process and is included in the Budget Detail/Justification that supports the official budget of the fully executed contract. All out-of-state travel requires prior approval from the USDA Western Regional Office and the Public Health Institute.

PHI/*Network* contracts require that travel expenses for approved scope of work activities adhere to the state standard travel reimbursement rates established by the Department of Personnel Administration (DPA) as described in the Travel Reimbursement Information Exhibit with the contract.

Travel reimbursement rates apply to those travelers identified in the approved budget justification.

Contractors who have budgeted for travel should be knowledgeable of the DPA travel and per diem rates and should ensure that billings to the *Network* for employee's mileage and per diem do not exceed the allowable rates. The *Network* will not reimburse costs above the maximum allowable rates.

It is important that Contractors share DPA travel information with their subcontractors, consultants, advisory committee members, and other parties who provide services under the *Network* contract so that they adhere to the same rates and guidelines.

402. Excess Lodging Approval

The *Network* is aware that it is becoming increasingly difficult to stay within the DPA established maximum lodging rates for large meetings, conferences, etc. Therefore, the *Network* has established procedures for Contractors regulated by the DPA rates to obtain approval for excess lodging rates. Submit the following to the assigned CM:

1. An email Request for Excess Lodging Approval 30 days in advance of the need for the excess lodging rates.

2. A justification that details:
   - Conference name.
   - Location of conference.
   - Dates of conference.
   - Purpose of conference.

- Anticipated attendees.
- Summary of rates obtained from hotels in the area including names of hotels and available room rates, and any comments. A minimum of three quotes is preferred.
- Justification of need to exceed State rate for the geographical area.

Please allow CM to provide written response within two weeks of request. Once approved, the assigned CM will provide written notification of the approval.

403. Mileage Reimbursement

Contractors are eligible for travel reimbursement during the work day between worksites. When traveling to a temporary worksite from home, mileage reimbursement is calculated from the main worksite (not home address) to the temporary worksite. Consultants are eligible to seek travel reimbursement from their “home office” to the worksite.

II.	FISCAL SECTION
500.	Equipment Purchases

This Chapter Includes:

501. General Information
502. Contractor Equipment Purchased with CDPH Funds
503. Inventory/Disposition of CDPH-Funded Equipment
504. Lost, Stolen, or Destroyed Equipment
505. Procedures and Guidelines for Computers and Mobile Devices
506. Limitations of Equipment Purchases

501. General Information

This information applies to equipment purchased with PHI/*Network* funds. Equipment, for the purpose of the *Network*, is defined as non-expendable property used in conducting eligible nutrition education activities, and includes items such as computers, televisions, VCRs, cameras, typewriters, calculators, furniture, etc. Equipment is defined as:

1. **Major equipment:** A tangible or intangible item having a base unit cost of $5,000 or more with a life expectancy of one year or more and the cost is reimbursed through this agreement. [Note: Major equipment is NOT an allowable expense for Faith Project Contractors].
2. **Minor equipment**: A tangible item having a base unit cost of less that $5,000 with a life expectancy of one year or more that is listed on the CDPH Asset Management Unit's Minor Equipment List and is either furnished by the *Network* or the cost is reimbursed through this agreement.
3. **Miscellaneous property**: A specific tangible item with a life expectancy of one year or more that is either furnished by the *Network* or the cost is reimbursed through this agreement. Examples include, but are not limited to: furniture (excluding modular furniture), cabinets, desktop calculators, portable dictators, non-digital cameras, etc.

All equipment purchased solely or partially with *Network* funds belongs to the State and may be retrieved upon termination of the contract. Do not dispose of equipment in any manner without obtaining prior written approval from the *Network*.

Be sure to prorate the cost of the equipment if it will not be used exclusively for eligible nutrition education activities. Also, for staff dedicating less than 100% full time equivalent (FTE), Contractors need to prorate the cost of equipment to reflect the percentage of time spent or the proportion of the activity that relates directly to SNAP-Education. Equipment will not be allowed for staff dedicating less than 50% FTE.

502. Contractor Equipment Purchased with CDPH Funds

All equipment purchased with *Network* funds must be documented on the Contractor Equipment Purchased with CDPH Funds form. Submit this completed form with any invoice that contains expenditures for equipment. If required, CDPH will issue State ID

tags for the equipment, and the assigned CM will forward the tags and instructions to the Contractor for placement of the tags on the equipment.

Please note that the following items do not require State issued ID tags:

1. Blenders
2. Heavy duty steel shelves for storage
3. Lightweight plastic shelves for storage
4. Plastic storage bins
5. Ergonomically correct keyboard shelf (purchased separately from computer desk)
6. Crock pots
7. Toaster ovens
8. Plastic rolling carts
9. Metal rolling carts
10. Computer mouse

If an invoice that contains an expense for equipment is submitted without the Contractor Equipment Purchased with CDPH Funds form, the invoice will not be processed until the form is received and approved.

Please review the contract boilerplate for additional procurement rules and regulations. The following steps must be completed to receive reimbursement for equipment:

1. All equipment purchased under this contract must have previously been described in the "Equipment Expenses" line item of your approved Budget Justification. *Network* approval must be obtained for any additional equipment that was not previously approved on the justification.
2. Immediately after purchasing equipment, complete the form entitled Contractor Equipment Purchased with CDPH Funds. Directions are on the back of the form. List all equipment purchased.
3. Submit the completed form to the assigned CM along with the Invoice on which the equipment expense is billed. **Do not** submit the form directly to the CDPH Asset Management Unit. Equipment purchases billed (invoiced) to the contract will not be paid until the Contractor Equipment Purchased with CDPH Funds form has been submitted and approved.

503. Inventory/Disposition of CDPH-Funded Equipment

If the term of the contract covers more than one year, and the equipment was purchased with *Network* funds, the Contractor must submit an annual inventory of that equipment using the Inventory/Disposition of CDPH Funded Equipment within 60 days of the end of the fiscal year.

This form must also be submitted along with the final Invoice within 60 calendar days of the termination of the contract (or alternate due date approved by the assigned CM). Upon receipt and approval of the completed Inventory/Disposition of CDPH-Funded Equipment form, the assigned CM will contact the Contractor regarding equipment disposition instructions. Final disposition of equipment shall be at the *Network's* expense and according to *Network* instructions. The *Network* may at its discretion, authorize the continued use of State equipment for performance of work under a different CDPH agreement.

504. Lost, Stolen, or Destroyed Equipment

Whenever equipment is lost, stolen, or destroyed, a report that contains the following information must be filed with your CM within 24 hours of the event:

1. A description of the events.
2. A completed Inventory/Disposition of CDPH Funded Equipment form identifying State identification tag number(s) of the item(s) lost, stolen, or destroyed.
3. A copy of the police report (not applicable for lost or destroyed equipment) and Report of Crime on State Property form.
4. A Property Survey Report completed using disposal code #5 with certification box completed.
5. Precautions to be taken to prevent repeat situations.
6. Complete a Contractor Equipment Purchased with CDPH Funds form for any purchase of replacement equipment. Note: Purchasing replacement equipment will most likely require a budget adjustment to move additional funds into the Equipment Expenses line item.

505. Procedures and Guidelines for Computers and Mobile Devices

Contractors are responsible for the security of their assigned CDPH computer and mobile device resources and the information (data) that is under their control. Contractor responsibility also extends to subcontractors and consultants under their charge that utilize resources and information purchased with contract funds. Mobile devices include such items as laptops, portable computers, PDAs, CDs, DVDs, and flash drives. The *Network* will not reimburse for computers and/or mobile devices until Contractors can verify that they have adequate data encryption and virus protection software on their equipment.

Procedures and guidelines for computers and mobile devices include:

1. **Computer and Data Security:** Contractors are responsible for the security of their assigned CDPH resources and the information under their control. The following steps are to be taken to protect computer equipment from theft, unauthorized use, and to ensure that CDPH systems and information privacy and security are not inadvertently compromised:
    a. Contractors shall use CDPH information and resources only for CDPH business purposes.
    b. Desktop and mobile systems shall be kept in secure areas (i.e., a secure building or room) or shall be physically attached to a desk or table.
    c. The use of surge protectors is required.
    d. During non-working hours, personal, sensitive, and confidential information shall be kept in a locked office, desk, file, or cabinet, even if the building is secured.

2. **Mobile Computing and Removable Storage Purpose/Scope:** For the purposes of this policy, mobile and computing devices are defined as any portable device, such as laptops, PDAs, Blackberries, tablet PCs, or removable storage, such as

compact disk (CD), USB drive, diskette, or other devices that have the ability to store information. Mobile computing has become an inherent part of doing business at CDPH. Most mobile and removable storage devices have the capacity to store CDPH information. Because data can be portable, CDPH shall ensure due diligence is taken to protect data appropriately. Contractors shall take reasonable precautions for both the security of their devices and the information they contain.

a. Contractors are required to install a virus protection application and a 128 bit hard drive encryption application on all laptops or tablet PCs.

3. **Allocation:**
   a. All mobile devices issued to the contractor remain the property of CDPH.
   b. In the event of the termination of the contract the contractor shall return the CDPH mobile device to the immediate supervisor or contract manager.

4. **Physical Security**
   a. Mobile devices shall not be left unattended at the worksite at any time. When taken off the worksite premises, mobile devices shall not be separated from contractor at airports, automobiles, or hotel rooms.
   b. If the mobile device is left unattended the contractor is required to make certain the device is securely locked away or cable secured to a hard-to-move or immovable object.

5. **Tracking/Recovery:** If the device is lost or stolen, please contact your Contract Manager within 24 hours of the event.

6. **Maintenance:** Contractors are required to regularly maintain their mobile devices with the latest updates (e.g., update anti-virus, updated encryption and Microsoft patches).

506. Limitations of Equipment Purchases

1. **Computers:** Contractors are allowed to purchase a computer for any staff performing SNAP-Education activities that are budgeted at 50% or more FTE. If the staff member is not 100% allocated to SNAP-Education activities, this cost must be prorated. Note: costs do not have to be prorated when a staff member's entire FTE is dedicated to SNAP-Education activities even if their FTE is less than 100%. For example, an employee who is .60 FTE but who only works on SNAP-Education activities would not need to prorate their computer.

   Note: The useful life of a computer is five years. (Internal Revenue Service)

2. **Computer Laptops:** Laptop computers will need a separate justification for approval and should only be allowed when the following criteria are met:

   - Purchase of a laptop is tied to a position.

- The position is 100% FTE in the field. (A lower FTE may be considered with appropriate Contractor justification. If the lower FTE is approved, costs must be prorated by FTE.)
- The cost is reasonable.

For Subcontractors, purchases must be made by the prime Contractor, so equipment tagging requirements can be met, procedures and guidelines for contractor computers and mobile devices applied, and inventory control can be maintained. Contractors purchasing laptops with SNAP-Education funds are required to submit evidence of responsibility addressing the protection of privacy data, necessary steps in the occurrence of a security breach, and responsibility for negligence. The *Network* will not reimburse for laptops until Contractors can verify that they have adequate data encryption and virus protection software on their equipment.

The useful life of a laptop is five years. (Internal Revenue Service)

3. **Digital Cameras:** Contractors will be allowed to purchase one digital camera. All requests must include a justification for approval on the Budget Justification, including which activities the camera will be used for and which SOW objective(s) the camera is needed to support.

4. **Video Cameras:** USDA does not generally consider video cameras a reasonable use of SNAP-Education funds.

5. **Cellular Phones:** Cellular phones are generally an unallowable expense.

6. **Global Positioning Systems (GPS):** Using SNAP-Education funds to purchase GPS systems and/or devices is unallowable.

II.	FISCAL SECTION
600.	Staff Activity Reporting Requirements

This Chapter Includes:

601. General Information
602. Staff Devoting 100% of Time to SNAP-Education
603. Staff Devoting Less Than 100% of Time to SNAP-Education
604. Time Record Signatory Authority
605. Transmittal Sheet
606. Reporting of Absences, Vacation and/or Leave

601. General Information

All contract staff are required to document their personnel time being reimbursed through the *Network* contract. There are two mechanisms to document staff time: one mechanism for staff dedicating 100% of their Full Time Equivalent (FTE) positions to the contract and another mechanism for staff NOT dedicating 100% of their FTE positions to the contract.

602. Staff Devoting 100% of Time to SNAP-Education

A Semi-Annual Certification of Activity Form must be signed each required period by the employee and supervisor and must be maintained on file at the agency for all staff dedicating 100% time to SNAP-Education. The *Network* requires that Contractors use this form, but if the Contractor has another certification methodology, the *Network* is willing to review it; please send the form to the assigned CM.

Contractors must submit signed Duty Statements for those contract staff dedicating 100% FTE to a *Network* contract for review and approval by both your CM and PM on an annual basis. Contractors need to inform their CM of staff or duty changes when they occur.

603. Staff Devoting Less Than 100% of Time to SNAP-Education

Staff devoting less than 100% of time to SNAP-Education must complete the Weekly Time Log to document personnel time. Weekly Time Log records are required for any staff dedicating less than 100% time to SNAP-Education. All Weekly Time Logs must be completed and signed by the individual contributing time and based upon actual hours worked for SNAP-Education and signed off by a supervisor or designee. If your organization would like to use a customized version of the weekly time log form, you must seek approval from your CM.

604. Time Record Signatory Authority

As long as the person signing off on the time log has direct knowledge of the employee's activities and the agency authorizes them to sign, the signatory does not have to be a supervisor. This means that Project Coordinators may sign off on the time logs/studies.

USDA will allow electronic signatures inserted directly on time records/cover sheets, for both SNAP-Education staff and supervisors. (Note: this refers to an actual electronic script signature; this is not the same as using a pin number to sign time records.) Time records/sheet can be certified in bulk and transmitted electronically (up to 20 sheets per transmittal with a supervisor's electronic signature.) Please note, however, that the use of electronic signatures only pertains to supervisory approval of weekly time logs. Electronic signatures are not allowed for the individual contributing time to SNAP-Education.

605. Transmittal Sheet

USDA will allow SNAP-Education time records to be batched in bulk with a signed Transmittal/Cover Sheet.

As always, back-up documentation must remain available to PHI, the *Network*, CDPH and/or USDA for auditing purposes. (The transmittal sheet can be signed by a supervisor, project coordinator, or other authorized representative of the agency.)

606. Reporting of Absences, Vacation, and/or Leave

Only paid absences, vacation, and/or leave scheduled to be reimbursed with *Network* funding needs to be reported on the weekly time logs. Absences, vacation, and other leave time that is not being invoiced does not need to be reported on the time log. The *Network* will reimburse paid absences proscribed by the Faith Project's employee policy manual only. Faith Projects, therefore, should be prepared to submit copies of their manuals along with any requests for reimbursement. At the very least, an employee policy manual should contain the following sections:

- Drug-free and harassment-free work environment statement
- AA/EOP statement
- Conflict of Interest Policy statement
- List of Paid Holidays
- Sick/Medical Leave/Vacation/Military/Bereavement/Disability/Personal/Jury Duty/Leave Without Pay policy and procedures
- Termination of Employment
- Confidentiality of Employee Information

II.	FISCAL SECTION
700.	Budget Revisions and Amendments

This Chapter Includes:

701. General Information
702. Requesting a Budget Revision
703. Budget Adjustment Request
704. Formal Contract Amendment

701. General Information

A Budget Adjustment Request (BAR) is required to revise any line items in a budget. Revisions to budget line items must be submitted to and approved by the assigned CM and PM prior to implementation. The Network recommends Contractors submit no more than one BAR per contract year. Additionally, it is recommended that BARs be submitted during the first nine months of the contract year. For this reason, Contractors must project future spending patterns and adjust budgets on a regular basis to avoid multiple BARs. Furthermore, you may be required to complete a BAR during a contract year if there are changes to the USDA SNAP-ED allowable/unallowable cost rules.

702. Requesting a Budget Revision

Most budget revisions can be completed informally using a BAR Form. However, in some cases, budget revisions require a formal contract amendment. The assigned CM can determine whether the budget revision requested can be accomplished as an informal budget revision using a BAR or if it will require a formal contract amendment. To request a budget revision, Contractors should:

1. Email the assigned CM with a finalized BAR.
2. Provide a justification as to why the budget revision is necessary.
3. Provide revised Budget Justification showing each line item that is impacted utilizing strike out for deletions and bold for additions.

703. Budget Adjustment Request

A Budget Adjustment Request (BAR) may be used to revise line item amounts:

1. Subject to the prior review and approval of the *Network*, line item shifts of up to ten percent (10%) of the annual contract total are allowed, so long as the annual budget total neither increases nor decreases.
2. Allowable changes include revisions to the budget detail that make up a given line item.
3. The change is programmatically justified and does not extensively alter the approved SOW.
4. A narrative is submitted explaining the changes to each line item that is impacted.

The CM will communicate approval of the BAR or address any problems with the Contractor. After approval, the “Revised Approved Budget” amounts on the BAR form

should be used to replace the “Approved Budget” amounts on any future budget documents (e.g., Invoice).

704. Formal Contract Amendment

A formal contract amendment may be required when there are significant changes to either the budget or scope of work.

Formal amendments must be submitted to and approved by the assigned CM and PM, prior to implementation. Submission of a formal contract amendment must be made prior to the end of the contract term. Formal amendments are effective only after they are reviewed, approved, and processed by PHI. The formal contract amendment process is often time-consuming and formal contract amendments are subject to the same approval process as the original contract. No invoices can be processed for the time period being amended until the amendment is fully approved. Contractors should contact the CM and PM as soon as it is determined that an amendment may be necessary.

II.	FISCAL SECTION
800.	Desk Reviews, Site Visits, and Program Compliance Reviews

This Chapter Includes:

801. General Information
802. Site Visits
803. Desk Review

801. General Information

The *Network* will conduct programmatic and fiscal reviews of *Network* contracts on an annual basis to ensure compliance with USDA Guidance and to ensure the continued funding from USDA based on both solid program and fiscal compliance.

802. Site Visits

Formal site visits will be conducted annually on *Network* contracts. The purpose of a site visit is to:

1. Monitor and evaluate progress in completing contract deliverables.
2. Ensure compliance with USDA guidelines (cost allocation, Invoice documentation, identify changes in budgets and scopes of work).
3. Provide programmatic and administrative technical assistance.
4. Observe and collect information on innovative strategies.
5. Observe programmatic activities.
6. Build partnerships.

Site visits are conducted by the assigned Contract and Program Managers. It is the responsibility of each Contractor to maintain accurate and verifiable records in order to support all expenses and document activities claimed under the *Network* program.
Note: Your Program Manager may conduct informal site visits at his or her discretion.

Site Visit Confirmation Letter

A Site Visit Confirmation Letter will be sent to the Contractor at least two weeks in advance of a formal site visit, confirming the date, time, and location of the site visit. The letter will include the primary areas to be discussed, an agenda and will indicate what type of documentation and records should be available for review by *Network* staff.

Site Visit Report and Cover Letter

Network staff will generate a Site Visit Report and cover letter for formal site visits summarizing site visit issues, key findings, and recommendations. A Site Visit Report will be sent to the contractor within 30 calendar days of conducting a site visit. The report will summarize findings and recommendations. If necessary, the report

will include a follow-up plan addressing concerns or issues identified during the site visit or desk review.

803. Desk Review

Desk reviews may be conducted annually or as needed on identified invoice periods for each *African American Campaign* Faith Project contract. This may be done independently or coordinated with any site visit scheduled for the year. The Desk Review documentation requested should match the quarterly invoice billed with back-up documentation for each line item in the approved budget and budget justification. If a discrepancy is found, the Contractor will need to provide a justification for the discrepancy.

The purpose of the desk review is to ascertain your agencies adherence to the fiscal documentation requirements outlined in your contract and the Guidelines Manual.

Desk Review Procedure: All expenditure documentation that is batched for each line item must equal the total amount reflected for that line item on the official Invoice being reviewed. The expenditure documentation will need to be separated, batched, and labeled according to the line item in which the expenses were claimed. A summary spreadsheet of the expenses for the specific line items requested is required on top of each batch, and the amount of the summary spreadsheet should reflect the amount claimed for that line item for the period (quarter) being reviewed. If your accounting system is capable of generating reports that contain detailed expenditure object codes which track expenditures to specific line items, you may use these reports as the required summary spreadsheets. Please provide a key for the expenditure object codes that have been designated for the report to assist with the review.

The documentation you must maintain includes, but is not limited to the items listed in Section 202, Required Supporting Documentation. For instance, agency records (including timesheets and agency purchase orders), where appropriate, should include signatures of authorized agency officials and the dates of expenses. Invoices, bills, or receipts from outside vendors/businesses should identify the vendor name, vendor location (e.g., address and/or phone number), item of expense, amount, and date. If your agency prorates their expenses among several projects, please provide an explanation of how you arrived at the percentage charged to the *Network* contract. Also, the expenditure source documentation provided for the items purchased or encumbered must be dated within the quarter the reimbursement was requested.

II.	FISCAL SECTION
900.	Contract Compliance

The Contractor is responsible and accountable for meeting all contract requirements. This includes timely and accurate submission of:

1. Progress Reports
2. Activity Tracking Forms
3. Invoices
4. All SOW deliverables
5. Documentation for all expenditures
6. Responses to *Network* inquiries for information

The assigned CM and PM will monitor each contract for responsiveness to the above listed contract requirements. Contractors are to promptly notify their assigned CM or PM if potential problems arise.

The above list of contract requirements must be met for a Contractor to be considered compliant with the fiscal and administrative guidelines of a contract. Should it be determined that a pattern of non-compliance with these requirements exists and remedial efforts are ineffective, corrective actions will be taken to improve the performance of the Contractor.

Non-compliant and/or underperforming Contractors will be subject to corrective actions, which may include but are not limited to:

1. Withholding invoice payments
2. Requesting refund of prior payment(s)
3. Reducing the contract term
4. Not renewing a contract and/or contract termination

II.	FISCAL SECTION
1000.	Agency Audit Requirements

This Chapter Includes:

1001. General Information
1002. Financial and Compliance Audit
1003. Program Audit
1004. Procedures
1005. Access to Records

1001. General Information

As required when utilizing federal funds, the *Network* is requiring annual Financial and Compliance Audits for all contracts. The information contained here is a summary of the complete requirements outlined in the executed contract boilerplate language, Exhibit D(f) Special Terms and Conditions. Contractors must review the Financial and Compliance Audit Requirements section, to ensure compliance with the federal requirements.

1002. Financial and Compliance Audit

All *Network* contracts are federally funded and are defined as direct service contracts; therefore, all contracts must comply with the following:

1. If the Contractor is a nonprofit organization (as defined in H&S Code section 38040) and receives **$25,000 or more** from any State agency under a direct service contract; the Contractor agrees to obtain an annual single, organization wide, financial and compliance audit. Said audit shall be conducted according to generally accepted auditing standards. This audit does not fulfill the audit requirements of Paragraph 3 below. The audit shall be completed by the 15th day of the fifth month following the end of the Contractor's fiscal year, **and/or**
2. If the Contractor is a nonprofit organization (as defined in H&S Code section 38040) and receives **less than $25,000** per year from any State agency under a direct service contract, the Contractor agrees to obtain a biennial single, organization wide financial and compliance audit, unless there is evidence of fraud or other violation of state law in connection with this agreement. This audit does not fulfill the audit requirements of Paragraph 3 below. The audit shall be completed by the 15th day of the fifth month following the end of the Contractor's fiscal year, **and/or**
3. If the Contractor is a State or Local Government entity or Nonprofit organization (as defined by the Federal Office of Management and Budget (OMB) Circular A -133 and expends $300,000 or more in Federal awards, the Contractor agrees to obtain an annual single, organization wide, financial and compliance audit according to the requirements specified in OMB Circular A -133 entitled "Audits of States, Local Governments, and Non-Profit Organizations" (available to view at http://www.whitehouse.gov/omb/circulars/index.html). An audit conducted pursuant to this provision will fulfill the audit requirements outlined in Paragraphs 602-1 and 602-2 above. The audit shall be completed by the end of the ninth month following the end of the audit period.

4. If the Contractor submits to the *Network* a report of an audit other than an OMB A-133 audit, the Contractor must also submit a certification indicating that the Contractor has not expended $300,000 or more in Federal funds for the year covered by the audit report.
5. The audit report must identify the Contractor's legal name and the number assigned to the executed contract. Submit two copies of the audit report to the assigned CM within 30 days after the completion of the audit. Upon receipt of the audit report, the CM will review the report and notify the Contractor if any audit finding needs to be addressed.

1003. Program Audit

At any time during the term of a *Network*-funded contract, and at any time within three years after termination of that contract, the Contractor's or any subcontractor's books and records shall be subject to audit by the State and, where applicable, the Federal Government, to the extent that the books and records relate to the performance of the contract. In the event of an audit, an agency or organization's nutrition program records must be sufficient and clear enough to support all claims.

1004. Procedures

1. The Auditing Agency will send out a notification letter to the selected Contractor at least one month prior to the scheduled review. The review may look at financial activity for all financial periods not previously audited to the most current financial period.
2. The Auditor will also send out a brief questionnaire to be completed by the Contractor prior to the financial review. Completion of the questionnaire will expedite the actual review process.
3. The Contractor will have available during the audit all proper fiscal and program staff, as well as all records necessary to respond to questions.
4. The Auditor will give an exit interview to make suggestions and comments regarding the preliminary findings of the financial review. A formal report will be sent within three months of the visit.

1005. Access to Records

Contractors must maintain records reflecting actual expenditures for each year covered by the term of the contract. These source documents must be available if the *Network* chooses to review fiscal records or if the USDA chooses to audit the Contractor. All source documents must be maintained in project records for a minimum of three years after the end of the contract term. All documents used to support and substantiate expenses must be accessible to the State upon request.

III. Administrative Section

This material was produced by the California Department of Public Health, *Network for a Healthy California*, with funding from the USDA Supplemental Nutrition Assistance Program (formerly the Food Stamp Program). These institutions are equal opportunity providers and employers. In California, food stamps provide assistance to low-income households, and can help buy nutritious foods for better health. For food stamp information, call 877-847-3663. For important nutrition information, visit www.cachampionsforchange.net.

III.	ADMINISTRATIVE SECTION
100.	**Progress Reporting**

This Chapter includes:

101. Progress Reporting Overview
102. Progress Report Narrative
103. Scope of Work (SOW) Progress Report
104. Activity Tracking Form
105. Attachments
106. Due Dates

101. Progress Reporting Overview

Contractors are required to submit Mid-Year, Annual, and Final Progress Reports describing the status of funded SOW activities. The Mid-Year Progress Report should reflect activities implemented and/or completed between October 1st and March 31st of each contract year. The Annual Progress Report should be a **cumulative** report of the entire progress of the SOW from October 1st through September 30th (the entire Federal Fiscal Year [FFY]). The Final Progress Report is the last report for the contract period and should reflect only the last year of the contract.

The required documents for the Mid-Year Progress Report are: the Progress Report Narrative, the SOW Progress Report Form, and the Activity Tracking Form. The required documents for the Annual and Final Progress Reports are the same as those required for the Mid-year Progress Report **and** must also include electronic copies of attachments. Although attachments are not due with the Semi-Annual Progress Report, Contractors should collect such documentation throughout the year.

It is important that Contractors read all forms and instructions carefully to ensure correct and accurate reporting. Prior to the progress report deadlines, please check the *Network* website to ensure that the most updated forms are being used. Timely submission of the reports is necessary to ensure continued USDA funding. Extensions are granted on an emergency case-by-case basis only and must be requested in writing. **The *Network* will withhold the Contractor's payment until the Progress Reports are received, reviewed, and considered complete.**

The Mid-Year, Annual, and Final Progress Reports are to be submitted via e-mail to AAFNetworkEmail@cdph.ca.gov. In the subject line, please specify the name of the region, contract number, and time period covered by the progress report. One copy of the attachments are to only be submitted along with the Annual and Final Progress Reports, which must be submitted for all reporting periods to the assigned PM via postal mail. Contractors are encouraged to contact their assigned PM for questions regarding this process.

102. Progress Report Narrative

The achievements of the Faith Projects are valued by the *Network* and may be helpful to other Contractors as they develop and implement nutrition education activities. This

section provides an opportunity to share your experience in working towards accomplishing SOW objectives and activities in a narrative format. This format can enrich the information provided to the *Network* in the SOW Progress Report for each of the objectives and activities; therefore the *Network* strongly encourages you to take advantage of this opportunity to showcase your successes.

The Narrative should be **5 – 8 pages** in length and contain the following components:

A. **Overview of Key Successes**

Key successes achieved by the Faith Project in reaching your targeted audiences including but not limited to the following:

a. Discuss any integration with *African American Campaign* or *Regional Network* Collaborative activities.
b. Describe partnership developments, coordination, communication, media attention, trainings, etc.
c. Discuss results of any evaluation activities and how results were used and shared.
d. Additional SOW activity descriptors not already provided in the SOW Progress Report Form (described below).

B. **Accomplishments with SNAP-Ed-eligible Communities**

Accomplishments achieved within various communities by engaging the SNAP-Ed-eligible target audience through nutrition education and activities to encourage healthier lifestyles and promote changes within their community.

C. **New Opportunities**

New opportunities that have resulted from the continued regional efforts and/or better integration with other *Network*-funded projects.

D. **Challenges/Requests for Technical Assistance**

Challenges faced by the Faith Project that have impeded or are currently impeding progress toward the completion of activities and/or goals.

a. Describe how the Faith Project has addressed the issue or problem.
b. Discuss any technical assistance that may be needed.

Please share any additional ideas or comments that are pertinent to understanding the work that is being done within the region for continued success.

103. Scope of Work Progress Report

The SOW Progress Report Form provides an easy reference for the status of SOW activities. The form was designed to be used throughout the contract/fiscal year to track and monitor progress made towards completion of the activities within each SOW.

Status of Activities: For each objective and activity, indicate completion status. Use the following terms and definitions in designating completion status:

Partially Complete: indicates steps have been taken towards the completion of the activity, but have not been completed during the reporting period. Progress should also be noted either quantitatively (e.g. two out of three Champion Pastors recruited) or by a brief narrative.

Delayed: indicates the activity did not start during the reporting period as planned. The term "delayed" cannot be used in the final reporting period of a contract. If an activity has a "delayed" status there must be a brief justification provided.

Completed: indicates the activity was completed during the current or previous reporting period. Please Note: A written justification is required in the Final Progress Report Narrative for any Objective and/or Activity not fully completed during the final year of the contract. Please bring to the attention of the PM any Objectives/Activities not making satisfactory progress before the end of the contract whenever possible. Discussions on revisions to these activities may follow.

No Action Requested: indicates that during the reporting period the State had no requests for Regional Network participation in the specified activity. (This response will occur for scope of work activities that state "Upon request.") or that the specified scope of work activity will be initiated, as per the Timeframe column, in future reporting periods.

104. Activity Tracking Form

The Activity Tracking Form (ATF) is designed to track and compile major program activities by objective, date, type of activity, and reach. The ATF includes questions such as: What churches or individuals did you work with? What activities took place? Where did they occur? How many people were involved? etc. This document allows the Research and Evaluation Unit and the PM to verify that program activities are reported in a quantitative, accurate manner. These numbers are compiled for all contractors and submitted to USDA annually. Most of the activities requiring ATF reporting are clearly labeled in the Key Deliverables column of the SOW. The ATF should be submitted on the following dates:

08/31/09 Using the provided Activity Tracking Form (ATF), develop a database of all eligible and potentially-eligible church sites within the association serving a high proportion of African American families. These churches should be located within the six regions where the *Network for a Healthy California - African American Campaign* operates.

10/15/09 Develop and submit Status Report (aka: Year-End Report), including: 1) Status of all five tactics outlined in Objective 1 of the SOW; and 2) Updated ATF with status reports on the implementation of Body & Soul in each of the ten (10) or more churches recruited through your faith association.

105. Attachments

Attachments are required to be submitted only with the Annual and Final Progress Reports and should represent all activities conducted within the FFY, not the entire contract term. Please do not send attachments for Mid-Year Progress Reports submitted in April of each FFY.

Attachments are to include deliverables listed in the Key Deliverables column of your SOW. Original source documents such as sign-in sheets for specific events and individual surveys should not be submitted with your progress reports but will be randomly requested and/or reviewed at site visits. Label all attachments and all pages of the attachments by Goal, Objective, and Activity number, and a page number, and identify each attachment within the Narrative if referenced. Please submit one electronic copy of each attachment with the Annual and Final Progress Reports. All attachments must remain on file at your agency for three years.

106. Due Dates

Reports will be due on the following dates for the report periods indicated below.

Progress Reports

Period—Years 1 through 3	Due Date*
July 1, 2009 – September 30, 2009 (annual)	11/02/2009
October 1, 2009 – March 31, 2010 (mid-year)	04/30/2010
April 1, 2010 – September 30, 2010 (annual)	11/01/2010
October 1, 2010 – March 31, 2011 (mid-year)	05/02/2011
April 1, 2011 – September 30, 2011 (final)	10/31/2011

Activity Tracking Forms

Period—Year 1	Due Date*
July 1, 2009 – September 30, 2009	10/05/2009

Period—Year 2	Due Date*
October 1, 2009 – December 31, 2009	01/05/2010
January 1, 2010 – March 31, 2010	04/05/2010
April 1, 2010 – June 30, 2010	07/05/2010
July 1, 2010 – September 30, 2010	10/05/2010

Period—Year 3	Due Date*
October 1, 2010 – December 31, 2010	01/05/2011
January 1, 2011 – March 31, 2011	04/05/2011
April 1, 2011 – June 30, 2011	07/05/2011
July 1, 2011 – September 30, 2011	10/05/2011

*If the due date falls on a weekend please ensure the report is received by the next business day.

III.	ADMINISTRATIVE SECTION
200.	Success Stories

This Chapter includes:

201. General Information
202. What is a Success Story?
203. What do I have to do as a Faith Project Coordinator?

201. General Information

Faith Project contractors are required to complete three Success Stories and planning documents as part of their SOW. Instructions and a template for the Success Stories are available HERE.

202. What is a Success Story?

The purpose of a Success Story is to showcase some of the great things the *African American Campaign* and your faith association have inspired in your community. A Success Story doesn't mean you have to be the creator and director of the change—it means that you inspired a community group or person to want to make a sustainable change, and perhaps also provided resources/guidance along the way.

203. What do I have to do as a Faith Project Coordinator?

Step 1: Determine what your Success Story will be about?

- Meet with appropriate staff to identify some of your faith association's most compelling achievements.
- Present the idea to your *African American Campaign* Program Manager for final approval.

Step 2: Complete the Success Story Data Collection Tool worksheet

Step 3: Submit your completed Success Story Data Collection Tool to your Project Manager. The Data Collection Tool must be submitted No later than the year-end report.

Note: Your Success Story idea may be selected for publication. If it is selected, your Program Manager will develop a narrative based on your Data Collection Tool. You will be asked to review the narrative, offer input, and provide any information that is needed to complete the narrative.

III.	ADMINISTRATIVE SECTION
300.	Scope of Work Revisions

This Chapter Includes:

301. General Information
302. Informal Scope of Work Revision
303. Formal Contract Amendment
304. Requesting a Scope of Work Revision

301. General Information

Prior approval is required for any *Network* contract SOW revision. The Faith Projects contracts are templated to ensure consistent services are provided throughout the state. Any SOW revision will typically be initiated by the State *Network* Team. A SOW may be revised through one of two processes: the informal SOW revision process or the formal contract amendment process. The extent of the revisions will determine which of the two processes will be required.

302. Informal Scope of Work Revision

SOW revisions that only affect activities, deliverables, and/or performance time frames and DO NOT result in a change to the overall goals and basic purpose of the contract can be accomplished through an informal SOW revision. Informal SOW changes may include the substitution of specific activities or tasks, the alteration or substitution of contract deliverables, and modifications to anticipated completion dates. An informal SOW revision can be approved and implemented by the assigned Faith Project PM.

303. Formal Contract Amendment

SOW revisions that change the overall goal or basic purpose of any component of the SOW require a formal contract amendment. Formal amendments must be submitted to and approved by the assigned CM and PM, prior to implementation. Submission of a formal contract amendment must be made prior to the end of the contract term. Formal amendments are effective only after they are reviewed, approved, and processed by the *Network,* the Contractor, and the Public Health Institute. The formal contract amendment process is often time-consuming and formal contract amendments are subject to the same approval process as the original contract. No invoices can be processed involving the term of the amendment until the amendment is fully approved. Contractors should contact the CM and PM as soon as it is determined that an amendment may be necessary.

304. Requesting a Scope of Work Revision

To request a SOW revision, send an e-mail to the assigned PM detailing what revisions are needed and a justification for the revisions. Attach to the e-mail the pages of the SOW that are affected by the revisions. Indicate all revised items as follows:

- ~~Strike out~~ any deleted text so that it still appears and is not removed
- **Bold and underline added/new text**
- Informal SOW changes will be color-coded to indicate each revision.
- In general, informal changes are limited to no more than one (1) each contract year.
- Enter the revision number and revision date in the SOW footer in the corresponding color (e.g. Revision #1, 7/11/2009).
- If the revisions increase the total pages of the SOW, add the new pages directly behind the page to which it applies and number the new pages with .1, .2, .3, etc. after the original page number. For example, if the revisions made to page 10 of the SOW run to an additional page, number the additional page 10.1. This will eliminate the need to renumber all the pages that follow page 10.
- Informal changes will be approved by the assigned PM to ensure that the above criteria are met and there is negligible effect on the budget.

Upon review of the request to revise the SOW, the assigned PM will determine if the revision requested is justified and whether the revision can be accomplished with an informal SOW process or if a formal contract amendment is required. The PM will then send the Contractor an e-mail either approving or denying the revision request and will provide additional direction if a formal contract amendment is required.

III.	ADMINISTRATIVE SECTION
400.	Subcontracts and Consultant Requirements

This Chapter Includes:

401. General Information
402. Funding Application Requirements for Subcontracts
403. Agencies Exempt from Bidding Requirements
404. Key Elements Required in a Subcontract
405. Contractor's Responsibilities
406. Subcontracts
407. Consultants

401. General Information

The *Network* allows Contractors to enter into subcontracts and consultant agreements in order to fulfill the SOW and services outlined in a timely manner. Contractors intending to utilize subcontractor(s) to meet the objectives in their SOW must comply with these guidelines.

Contractors are responsible for all performance requirements as outlined in their contract SOW, even if performance is carried out through subcontractors, or consultants.

402. Funding Application Requirements for Subcontracts

Prior written approval is required for all subcontracts and consultant agreements paid for with *Network* funds. The following information pertaining to each subcontractor or consultant should be submitted to the assigned CM when the Contractor submits its Funding Application Package (FAP) along with a Subcontractor Agreement Form:

1. Subcontractor name (if known); List as "TBD" if not known.
2. Description of services or SOW.
3. Basis for costs (e.g., hourly or daily rate, # of hours/and or days to perform the deliverable).
4. Budget Justification.
5. Nine line item budget.

This information will be reviewed and approved during contract negotiations with the CM and PM. If the subcontractor has not been determined, submit the information to the *Network* as soon as the agreement is negotiated with the Contractor, so that *Network* staff can review and approve the subcontract for compliance with USDA and CDPH regulations. As required by USDA, prior written authorization is required for all subcontracts.

403. Agencies Exempt from Bidding Requirements

Subcontracts performed by the following entities or for the service type listed below are exempt from the bidding and sole source justification requirements:

1. A local governmental entity or the federal government.
2. A State college or university from any State.
3. A Joint Powers Authority.
4. An auxiliary organization of a California State University or a community college.
5. A foundation organized to support the Board of Governors of a California Community College.
6. An auxiliary organization to Student Aid Commission established under Education Code 69522.
7. Entities of any type that will provide subvention aid or direct services to the public.
8. Entities and/or service types identified as exempt from advertising in State Administration Manual Section 1233 subsection 3.

404. Key Elements Required in a Subcontract

The following key elements must be included in the subcontract:

1. Name of the parties entering into the agreement.
2. Terms of the agreement.
3. Scope of services or work to be completed.
4. Maximum amount payable.
5. Cancellation clause.
6. Record retention clause.
7. Copy of the Exhibit D(F) for Federally-funded contracts, page 7, paragraph 5. “Subcontractor Requirements”. [Exception: Regional contracts awarded to a “Regents of the University of California do not contain this exhibit.]
8. Information confidentiality and security requirements.
9. Information systems security requirements for projects.

405. Contractor’s Responsibilities

The *Network* reserves the right to approve or disapprove the selection of subcontractors and with advanced written notice, require the substitution of subcontractors and require the Prime Contractor (i.e. faith project) to terminate subcontracts entered into to support this agreement.

Upon receipt of a written notice from *Network* requiring substitution and/or termination of a subcontract, the Prime Contractor shall take steps to ensure the completion of any work in progress and select replacement, if applicable, within 30 calendar days, unless a longer period is negotiated.

The sole responsibility rests with the Prime Contractor to ensure that subcontractors used in the performance of the *Network* contract are paid in a timely manner. The timeliness of said payments may be affected by the timeliness of payments issued by the *Network* to the agency. Funds expended by a subcontractor prior to the Prime Contractor obtaining approval from the *Network* for the subcontract may not be reimbursable in the event that the *Network* should subsequently disapprove the proposed subcontract.

The Prime Contractor remains responsible for all performance requirements under this agreement even though the performance may be carried out by a subcontractor.

Network Contractors must include provisions in all subcontract agreements that require subcontractors to comply with all applicable terms and conditions as specified in the executed CDPH contract boilerplate language, specifically Exhibit D(F).

The Prime Contractor agrees to include the following clause, relevant to record retention, in all subcontracts for services:

- (Subcontractor's Name) agrees to maintain and preserve until three years after termination of (Agreement #) and final payment from the *Network*, to permit CDPH, USDA or any duly authorized representative to have access to, examine, or audit any pertinent books, documents, and records related to this subcontract and allow interviews of any employees who might reasonably have information related to such records.

Unless otherwise agreed to in writing by the *Network*, the Prime Contractor is the subcontractor's sole point of contact for all matters related to the performance and payment under the contract.

Upon execution of any subcontract and/or consultant agreement, Contractors are required to submit a copy of the fully executed subcontract agreement and/or consultant agreement to the assigned CM. If invoices are received which contain subcontract line item expenses, and a copy of the fully executed agreement is not on file with the *Network*, invoices will not be processed until a copy of the subcontract agreement is submitted.

406. Subcontracts

If the fully executed contract was negotiated and approved with identified subcontractors, then those subcontractors are considered pre-approved and no further approvals are necessary.

For subcontractors that were identified as "To Be Determined" at the time the contract was executed, and the resulting subcontract award total exceeds $5,000, obtaining a minimum of three bids or justifying a sole source award may be required. Please review the executed contract boilerplate language for specific Subcontract Requirements to determine if the bidding or sole source justification is required.
For any new subcontractors to be added to the contract, prior-approval from the PM is required. To request approval for additional subcontracts, send and e-mail request to the assigned PM and provide all the necessary information needed to evaluate the necessity or desirability of awarding additional subcontracts. Again, in many cases, obtaining at least three bids or justifying a sole source award may be required when

securing subcontracts which exceed $5,000. Please review the executed contract boilerplate language for specific Subcontract Requirements.

Contractors must include provisions in all subcontract agreements that requires subcontractors to comply with all applicable terms and conditions as specified in the executed contract boilerplate language.

Upon execution of any subcontract agreement, submit a copy of the fully executed subcontract agreement to the assigned CM. If invoices are received which contain subcontract line item expenses, and a copy of the fully executed subcontract agreement is not on file with the *Network*, invoices will not be processed until a copy of the subcontract agreement is submitted.

407. Consultants

If the fully executed contract was negotiated and approved with identified consultants, then those consultants are considered pre-approved and no further approvals are necessary.

For Consultants that were identified as "To Be Determined" at the time the contract was executed, and the resulting Consultant Agreement exceeds $5,000, obtaining a minimum of three bids or justifying a sole source award may be required. Please review the executed contract boilerplate for specific independent consultant requirements (found under Subcontract Requirements) to determine if the bidding or sole source justification is required.

For any new Consultants to be added to the contract, prior-approval from the assigned PM is required. To request approval for additional Consultants, send and e-mail request to the assigned PM and provide all the necessary information needed to evaluate the necessity or desirability of obtaining the Consultant. Again, in many cases, obtaining at least three bids or justifying a sole source award may be required when securing Consultant Agreements which exceed $5,000. Please review the executed contract boilerplate for specific independent consultant requirements (found under Subcontract Requirements).

Upon execution of any Consultant Agreement, submit a copy of the fully executed consultant Agreement to the assigned CM. If no formal agreement form is required by the Contractor's organization for consultants, submit a letter from the consultant, on the consultant's letterhead, which includes a brief description of the scope of work to be completed, rate of pay, number of hours, and total amount payable. If invoices are received which contain consultant expenses, and a copy of the Consultant Agreement is not on file with the *Network*, the invoices will not be processed until a copy of the Consultant Agreement is submitted.

III.	ADMINISTRATIVE SECTION
500.	USDA Guidance - Allowable and Unallowable Costs

General Information

USDA SNAP-Ed rules for allowable and unallowable costs apply to all activities and materials. All costs must be reasonable (in cost and scope) and necessary and targeted to SNAP-Ed-eligible persons. The allowable and unallowable costs may change every year based on annual USDA Guidance. The Contractor is required to comply with any such changes. The *Network* keeps the most current version of the USDA Allowable and Unallowable Costs Chart http://www.cdph.ca.gov/programs/cpns/Documents/CPNS-II300AllowableandUnallowableCosts.pdf on the *Network* website.

SNAP-Ed-eligible persons are defined as persons who are participating in the California Food Stamp Program, those who are likely eligible for participation in the Food Stamp Program because their income does not exceed 130 percent of Federal Poverty Level (FPL), or those who are potentially eligible because their incomes do not exceed 185 percent of FPL.

SNAP-Ed activities may be delivered with a waiver to potentially eligible target audience with at least 50 percent having household incomes not higher than 185 percent of the FPL. (Waiver to USDA will be completed by *Network* staff). Activities in school districts or organizations working with schools must have over 50 percent of the schools enrolled in the free or reduced price school meal program at each participating school site to qualify for funding. College students must be at 130 percent of FPL and meet at least one other USDA criterion.

If there are changes in the USDA *Food Stamp Nutrition Education Plan* for any given FFY that impact the Allowable and Unallowable Costs, the *Network* will update the website with a revised Allowable and Unallowable Costs document. Note: You will be required to comply with the new FFY USDA Guidance document once issued. You will be notified by e-mail if changes occur.

III.	ADMINISTRATIVE SECTION
600.	**Educational and Media Materials and Recipe Guidelines**

This Chapter Includes:

601. Existing *Network*-Approved Materials
602. Other Existing Materials
603. Developing New Educational and Media Materials
604. Media Materials and Activities
605. Newly Developed Recipes and Cookbooks

601. Existing *Network*-Approved Materials

There are many excellent nutrition education and physical activity promotion materials that *Network* contractors are encouraged to use. Many of these materials have been thoroughly pre-tested and evaluated. These include many USDA and *Network* produced educational and promotional materials. Examples include materials from the *Network*'s targeted campaigns and programs, including the *African American Campaign*, *Children's Power Play! Campaign*, *Latino Campaign*, *Retail Program*, and *Worksite Program*, as well as the *Network*'s *Harvest of the Month,* and USDA's MyPyramid and Team Nutrition resources. The *Network* provides a variety of materials to contractors to assist in conducting their interventions. In addition, USDA allowable materials are available at the USDA SNAP-Ed Connection website at http://snap.nal.usda.gov and through the *Network's* Communications Resource Library (online ordering system and cost recovery/online catalog) on the *Network* website www.networkforahealthycalifornia.net.

Local or regional contractors may also have developed materials that can be utilized. For materials developed by other local or regional *Network* contractors, first gather appropriate information about any testing/evaluation and its use to determine its appropriateness. Then, if deemed appropriate, contact your assigned PM for approval.

For other questions regarding use of existing *Network*-approved materials, please contact your PM.

602. Other Existing Materials

The *Network* requires contractors to research and identify existing *Network*-approved nutrition education and physical activity promotion materials for use in their programs before using other existing materials developed by other agencies. Unless previously discussed and approved by your PM, this includes materials that are either purchased, available at no cost, or donated.

Existing materials must:

- Address an Activity/Objective within the SOW.
- Be based on accurate scientific information related to diet and physical activity, and be consistent with information found in USDA *Dietary Guidelines for Americans* 2005 and MyPyramid.
- Support the behavioral objectives of the *Network*, which are to increase:

- Daily fruit and vegetable consumption;
- Daily physical activity;
- Food security; and
- Chronic disease prevention starting with obesity.

- Comply with the most current *Network* Allowable/Unallowable Chart.
- Be reviewed by a Registered Dietitian or someone with a Master's in Nutrition for any nutrition related information or material used for education/teaching purposes.
- Not endorse or promote brand name products or retail stores, as well as not disparage specific foods, beverages, or commodities.
- Be written at a 5th grade literacy level, easy to read, targeted to the SNAP-Ed eligible population, family-friendly, age-appropriate, economical, and culturally appropriate (e.g., African American, Latino, etc.). Training materials for intermediaries do not need to meet the 5th grade literacy level.

Copies of existing materials that contractors have determined to be allowable should be available onsite for *Network* staff review (e.g., during a site visit or upon request). For questions regarding existing materials, contractors are encouraged to contact their assigned PM.

603. Developing New Educational or Media Materials

The *Network* requires contractors to research and identify existing nutrition education and physical activity promotion materials for use in their programs before developing new materials. USDA strongly discourages the development of any new educational materials. If existing educational/promotional materials are examined thoroughly and none are found to fit the SNAP-Ed target audience, contractors may use *Network* funds to develop new material, but only with **prior** approval from their assigned PM.

The *Network* understands that in some instances it is appropriate to create new materials for a local audience. The following guidelines, **must** be followed when developing nutrition education and physical activity promotion materials. Prior approval must be obtained from the PM before beginning any work on developing new educational (and media) materials.

Newly developed materials must:

- Be accompanied by a completed Educational/Promotional Materials Review Form. If a contractor proposes to develop a new series of materials on a regular basis (e.g., newsletters, newspaper articles, etc.) then only one form has to be submitted for the series for the contract term.
- Be accompanied by the English text, if the new material is in a language other than English.
- Be submitted to the Program Manager at the *Network* in final draft form, prior to printing, filming (send video script) and disseminating the finished product.

- Be reviewed by a Registered Dietitian or someone with a Master's in Nutrition prior to submitting it to the Program Manager for review, if the material is used for educational/teaching purposes.
- Be based on accurate scientific information related to diet and physical activity, and be consistent with information found in USDA *Dietary Guidelines for Americans* 2005 and MyPyramid.
  - Support the behavioral objectives of the *Network*, which are to increase:
    - Daily fruit and vegetable consumption;
    - Daily physical activity;
    - Food security; and
    - Chronic disease prevention starting with obesity.
  - Be written at a 5th grade literacy level, easy to read, targeted to the SNAP-Ed eligible population, family-friendly, age-appropriate, economical, and culturally appropriate (e.g., African American, Latino, etc.). Training materials for intermediaries do not need to meet the 5th grade literacy level.
  - Include the required *Network*/USDA acknowledgement statements.
  - Address an Activity/Objective within the SOW.
  - Comply with the most current *Network* Allowable/Unallowable Chart.
  - Align with the *Network's Branding Guidelines Manual*.
  - Not endorse or promote brand name products or retails stores, as well as not disparage specific foods, beverages, or commodities.
  - Not reference specific benefits of different color groups of fruit and vegetables, but instead recommend eating a variety of colorful fruits and vegetables.

If materials are developed without prior approval and do not comply with the above guidelines, the cost of development, production and printing of such materials may not be paid for by the *Network*.

In general, contractors should allow ten working days from receipt of the material for approval from their PM. If the material is a curriculum with several components, additional review time may be required. Contractors may submit new materials and the Review Form to their PM by e-mail, fax, regular mail and overnight mail.

Contractors are invited to share their newly developed, *Network* approved materials with the USDA SNAP-Ed Connection website at http://snap.nal.usda.gov The SNAP-Ed website is an online resource provided by the USDA's Food and Nutrition Services and National Agriculture Library's Food and Nutrition Information Center. This website is designed to improve access to FSP nutrition resources, including curricula, lesson plans, research, training, tools and participant materials. The SNAP-Ed website provides information on how to submit materials for review and consideration for use on the SNAP-Ed website.

604. Media Materials and Activities

All locally or regionally produced media activities (local media activities, public relations activities, and those designed for mass public consumption) must go through the *Network's* media review process. All messaging conveyed through public channels, even through closed circuit channels like a school district's radio or TV station, qualify as media designed for mass public consumption.

Regionally-generated media activities that must go through the media review process include the following:

- PSA scripts prior to production, and the finished product
- radio scripts prior to production
- cooking demonstrations produced for TV
- outdoor advertising concepts prior to production, including transit
- press advisories and/or press releases prior to release

Contractors should follow the same guidelines for newly developed materials. Once submitted for approval, the PM will advance it through the *Network's* media review process. Some materials may be submitted to the USDA, Western Regional Office (WRO) for approval. In general, contractors should allow at least ten working days from receipt of the material for *Network* approval, even if it is submitted to the USDA, WRO for approval.

605. Newly Developed Recipes and Cookbooks

There are many reputable cookbooks and other resources available that provide hundreds of healthy recipes, including those developed by the *Network* and by the National Fruit and Vegetable Program (formerly 5 A Day). Contractors are encouraged to review existing healthy recipes before considering developing new recipes or cookbooks. Prior to developing new recipes or cookbooks, contractors should contact their assigned Program Manager, who will help determine whether it is necessary and feasible.

If it is determined that developing new recipes or cookbooks is necessary and feasible, then the contractor is required to adhere to the guidelines provided in the *Network's* Recipe Guidelines Manual. The manual provides important recipe criteria, nutrition terminology and nutrient claims, content and format requirements, nutritional analysis guidelines, approval forms and templates. The content of the manual should also apply to those recipes that are from non-*Network* approved resources. It is anticipated that the Recipe Guidelines Manual will be available in late 2009 on the *Network* website at www.networkforahealthycalifornia.net.

III. ADMINISTRATIVE SECTION

700. SNAP-Ed Recipient Guidelines

Supplemental Nutrition Assistance Program Education (SNAP-Ed) Recipient Guidelines

All Supplemental Nutrition Assistance Program Education (SNAP-Ed) activities must be targeted to SNAP-Ed eligible persons. These are defined as persons currently participating in or eligible for the United States Department of Agriculture (USDA) Supplemental Nutrition Assistance Program (SNAP) potentially because their incomes are not higher than 130 percent of Federal Poverty Level (FPL). With a waiver, activities may also be delivered to target audiences where at least 50 percent do not have household incomes higher than 185 percent of the FPL. The state-wide waiver to the USDA is completed by *Network* state staff. Table 1 provides the current Federal Poverty Levels.

Table 1. 2009 Federal Poverty Level Guidelines

2009 HHS Poverty Guidelines 48 Contiguous States and District of Columbia			
Persons in Family Unit	**Poverty Level**	**130% of Poverty Level**	**185% of Poverty Level**
1	$ 10,830.00	$ 14,079.00	$ 20,035.50
2	$ 14,570.00	$ 18,941.00	$ 26,954.50
3	$ 18,310.00	$ 23,803.00	$ 33,873.50
4	$ 22,050.00	$ 28,665.00	$ 40,792.50
5	$ 25,790.00	$ 33,527.00	$ 47,711.50
6	$ 29,530.00	$ 38,389.00	$ 54,630.50
7	$ 33,270.00	$ 43,251.00	$ 61,549.50
8	$ 37,010.00	$ 48,113.00	$ 68,468.50
For each additional person, add	$ 3,740.00	$ 4,862.00	$ 6,919.00
SOURCE: *Federal Register*, Vol. 74, No. 14, January 23, 2009, pp. 4199-4200.			

The USDA has categorized potential recipients of State SNAP-Ed activities into three categories, which are provided in Table 2.

Table 2. Audiences for Supplement Nutrition Assistance Program Education (SNAP-Ed)

	Audience	Likelihood of Reaching SNAP Eligibles	Examples	State Waiver Needed
Category 1	**Certified Eligibles** Includes persons currently participating in or applying for the SNAP and/or persons residing in a SNAP household. *This is the known FSP target audience.*	SNAP-Ed activities delivered to this audience clearly benefit SNAP eligibles.	• Persons referred by the local SNAP office. • Persons reached through direct marketing to SNAP participants. • Persons participating in the Food Distribution Program on Indian Reservations (FDPIR; see Appendix C, of SNAP-Ed Plan Guidance, Section A.3). • Ineligible parents who receive SNAP benefits on behalf of their child. • SNAP participants in a SNAP Job Readiness Training Program	No
Category 2	**Likely Eligibles as Established by Proxy Criteria** One of the following proxy criteria must be met: **A.** By Income. Persons not falling into category 1 above that have gross incomes at or below 130% of poverty guidelines. This criterion does **not** include persons typically ineligible for the SNAP (e.g., incarcerated persons, boarders, or college/university students. See Appendix C of SNAP-Ed Plan Guidance).	SNAP-Ed activities delivered to this audience are very likely to benefit SNAP eligibles. For the income-based proxy, partnerships are needed with other programs that have formal means-tested certification processes or similar income participation criteria. These partnerships will involve the implementation of a referral procedure that is based on income eligibility criteria.	• Income eligible persons (130% of poverty guidelines) referred by WIC, Medicaid, or Child Nutrition Programs. • Persons receiving Supplemental Security Income (SSI) or Temporary Assistance for Needy Families (TANF; see Appendix C of SNAP-Ed Plan Guidance, Section A.3 for more details on categorical eligibility). • Persons participating in TANF Job Readiness Training Programs.	No
	B. By Location. Persons receiving SNAP-Ed at: • SNAP/TANF offices • public housing (See Appendix D of SNAP-Ed Plan Guidance: Definitions) • food banks, food pantries, and soup kitchens in	SNAP-Ed activities delivered to this audience are very likely to benefit SNAP eligibles. For the income-based proxy, partnerships are needed with other	• Persons in a TANF office waiting area or conference room. • Persons at a public housing apartment community room or lobby. • Persons visiting a	No

	conjunction with the distribution of foods to needy persons at these sites (see Appendix D of SNAP-Ed Plan Guidance: Definitions). Note: food distribution is not a reimbursable SNAP-Ed expense (see Appendix C of SNAP-Ed Plan Guidance).	programs that have formal means-tested certification processes or similar income participation criteria. These partnerships will involve the implementation of a referral procedure that is based on income eligibility criteria.	food pantry to obtain food. • Persons receiving a meal at a soup kitchen.	
Category 3	**Potentially Eligible by Site/Location** **A.** Venues serving low-income populations based on income. Persons at venues when it can be documented that the location/venue serves generally low-income persons where at least 50% of persons have gross incomes at or below 185% of poverty guidelines/thresholds. **B.** Based on SNAP redemptions. Persons at stores with average monthly SNAP redemptions of $50,000. Stores with lower redemptions that do not meet the $50,000 threshold but do meet the 50 percent of 185 percent low income criterion may continue to be used as SNAP-Ed sites with an approved waiver.	SNAP-Ed activities delivered to this audience provide a fair likelihood of benefiting SNAP eligibles by providing services in sites/locations primarily frequented by a low-income audience. This audience may be served when it is not possible or practical to separate out Program eligibles and/or identify Program eligibility (e.g., social marketing campaigns). SNAP-Ed delivered to this audience should still be designed to meet the needs of SNAP eligibles.	• Persons residing or schools located in census tract areas where at least 50% of persons have gross incomes that are equal to or less than 185% of the poverty threshold. • Children in schools where at least 50% of children receive free and reduced priced meals. • Persons participating in the WIC program. • Persons shopping in grocery stores located in census tracts where at least 50% of persons have gross incomes that are equal to or less than 185% of the poverty threshold. • Persons shopping in grocery stores when the store has been documented to redeem average monthly SNAP benefits of $50,000 or more.	Yes Yes
SOURCE: *FFY 2009 USDA SNAP-Ed Plan Guidance*				

The *Network* provides a list of all qualifying census tracts on the *Network* website, www.networkforahealthycalifornia.net. Additionally, the *Network* provides an online Geographical Information System (GIS) Map Viewer, www.cnngis.org, to assist contractors in identifying qualifying sites. Information about the GIS Map Viewer is provided in Section 900, Technical Assistance and Support. Qualifying school Free and Reduced Price Meal data is available on the California Department of Education (CDE) website at www.cde.ca.gov/ds/. For more information about SNAP-Ed participant guidelines, contractors are encouraged to read the current USDA SNAP-Ed Plan

Guidance, which is available at http://snap.nal.usda.gov, or contact their assigned Program Manager.

Appendix: Forms

This material was produced by the California Department of Public Health, *Network for a Healthy California*, with funding from the USDA Supplemental Nutrition Assistance Program (formerly the Food Stamp Program). These institutions are equal opportunity providers and employers. In California, food stamps provide assistance to low-income households, and can help buy nutritious foods for better health. For food stamp information, call 877-847-3663. For important nutrition information, visit www.cachampionsforchange.net.

APPENDIX: FORMS

Form 1 - Budget Adjustment Request (BAR)

Form 2 - Support Schedule Form--Personnel (Faith)

Form 3 - Support Schedule Form--Op. Exp.

Form 4 - Support Schedule Form--Subcontracts (Faith)

Form 5 - Support Schedule Form--Travel Expense (Faith)

Form 6 - Support Schedule Form--Other Costs

Form 7 - Equipment Purchase with CDPH Funds

Form 8 - Inventory Disposition of CDPH Funded Equipment

Form 9 - Invoice

Form 10 - Contractor Information Form (CIF)

Form 11 - Semi-Annual Certificate of Activity

Form 12 - Sample Duty Statements

Form 13 - Sample Subcontractor Agreement

Form 14 - Travel Expense Claim (Faith-Rev 8.8.09)

Form 15 - Report Crime State Property

Form 16 - Property Survey Report

Form 17 - Weekly Time Log

Form 18 - Success Story Data Collection Tool

Form 19 – Network Fax Cover Sheet