



COVER SHEET

APPLICANT INFORMATION

Legal Name of Organization: The Health Trust (THT)

Mailing Address: 3180 Newberry Drive, Suite 200

City: San Jose

State: California

Zip Code: 95118

Web Address: www.healthtrust.org

Contact Person: Michelle Smith

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PROGRAM OVERVIEW

Program Name: Meals On Wheels

Location(s) where Sunnyvale clients will be served (include full street address(es):

Services are provided within homes of individual Sunnyvale clients throughout the City.

Brief Program Description:

Enter text here. **DO NOT EXCEED THE SIZE OF THE BOX.** Text will not print and your application will not be accepted. This note applies to all boxes that allow multiple lines of text in this application.

The Health Trust (THT) invites the City of Sunnyvale to continue partnering in providing Meals On Wheels program services for homebound Sunnyvale residents. The program includes nutritionally-balanced, home-delivered weekday meals; chilled weekend meals; Wellness Checks to ensure client safety and well-being; socialization; case management and referrals; and access to services such as PALS (Pets And their Loving Seniors), our free pet food program. City funding will be used to ensure Meals On Wheels program services for low-income frail elderly and disabled adults residing in the City of Sunnyvale.

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SECTION 1: FUNDING REQUEST FOR SUNNYVALE PROGRAM

A. City of Sunnyvale Funding Categories (See RFP Notice, page 8). Please select one:

- Operational Emergency Seed Program

B. Consolidated Plan Priority Need Type.

Select only one:

- A. Basic Needs (Food, financial aid, emergency shelter)
 B. Youth Intervention (mentoring/after-school programs)
 C. Mental Health or Substance Abuse Counseling
 D. Other Supportive Services (Legal aid, senior care services, disability-related services, etc.)

C. Program Financials¹

Funding Request: \$15,000.00

Total Program Cost: \$881,042.00

Cost per client for proposed Sunnyvale Program: \$1,468.00

Number of Sunnyvale clients to be served: 40

Total matching funds for proposed Sunnyvale services: 449,523

Match Ratio (% of program funded by matching funds): 51% (see Matching Funds note, below)

Is Applicant currently receiving funding from Sunnyvale? Yes No

Has the Applicant applied for funds from the City of Sunnyvale for this Program before? Yes No

If yes, complete the following chart for the previous five years.

Fiscal Year Applied	Amount Requested	Amount Awarded by City
2012-2013	6,551	7,130
2011-2012	8,840	6,551
2010-2011	10,140	8,520
2009-2010	9,063	9,063
2008-2009	13,108	9,063

¹ NOTE: Please see pages iii-iv of Application instructions for details on how to calculate Program Cost and Cost per client

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SECTION 2: PROGRAM INFORMATION

A. Program Overview and Target Clientele

1. Provide a brief description of the proposed Program, including the specific services to be provided to Sunnyvale clients with funds from the City of Sunnyvale. Describe your target clientele in terms of age group, income level, household type, etc.

SERVICES: THT's Meals On Wheels is to provide a daily nutritious meal and wellness services to assist homebound residents in maintaining their independence at home. HOT MEALS are delivered each weekday and CHILLED BOX LUNCHES are delivered on Friday for weekend consumption. All meals meet one-third of the Recommended Daily Requirements and are high in fiber and low in sodium, fat, and concentrated sugars. A WELLNESS CHECK is conducted with each meal delivery: drivers are trained to note changes in clients' cognitive awareness, potential safety hazards in the home, and whether meals are being eaten. This has been a lifesaving service for clients: drivers have found clients who have fallen or who have had medical emergencies. Over 50 investigative reports are submitted each month and immediately addressed to ensure client well-being. Additional services include CASE MANAGEMENT and REFERRALS; dietitian-approved wellness EDUCATIONAL MATERIALS; access to AUDIO BOOKS; in-home FALL PREVENTION resources; and access to PALS (Pets And their Loving Seniors), our free pet food program.

CLIENTELE: Our target clientele are HOMEBOUND frail elderly or disabled and who are at NUTRITIONAL RISK (i.e., have difficulty or are unable to shop and/or cook for themselves). This includes seniors (ages 60 and over), as well as disabled adults under the age of 60. THT serves all of Santa Clara County, but funding from the City of Sunnyvale will be used to support low-income clients (per HUD guidelines) who are residents of Sunnyvale.

2. Describe the type of needs(s) that the proposed Program would address, its impact on Sunnyvale, and which need or objective of the City's Consolidated Plan it is primarily intended to meet.

According to the 2010-2015 Consolidated Plan for the City of Sunnyvale, the City's population (in 2009) included over 15,270 seniors (11.8% of the population) and nearly 17,000 persons (over 12% of City residents) with one or more disabilities (physical, developmental, mental, and/or self-care). THT's Meals On Wheels program addresses critical needs for the portion of these residents who require specialized services to remain independent. For homebound frail elderly and disabled adults, adequate food and nutrition is essential to maintaining health: for these residents, hunger can be life-threatening, increasing the risk of stroke, prolonging recovery from illness, limiting the effects of prescription drugs, and decreasing resistance to infection. Despite living independently, clients served by the program are unable to shop for or prepare their own food. They may find tasks such as cutting a piece of fruit or using a can opener to be difficult - or impossible. In addition, for individuals on fixed incomes (particularly low-income residents), the rising costs of food and basic necessities make access to food a challenge. Aside from physical needs, this isolated population benefits significantly from social interactions offered by the program. For many clients, their Meals On Wheels driver is the ONLY person with whom they have contact each day. While supporting client safety (Wellness Checks, above), this interaction is vital even when food is available: in her 2011 testimony to the U.S. Senate Committee on Health, Education, Labor, & Pensions, Dr. Mary Jane Koren stated that "the most common cause of under-nutrition is depression." Without Meals On Wheels services, many clients would likely experience hunger, resulting in poor health or compelling them to give up their independent living at home and resort to institutional care. In addressing the critical needs of this fragile population, the proposed services address the City's Goal 3 COMMUNITY DEVELOPMENT ACTIVITIES and Objective 1 to "Provide public services, especially for people with VERY LOW INCOMES and/or special needs, such as SENIORS, DISABLED ..." In particular, these services address BASIC NEEDS associated with FOOD.

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3. Describe the Program's client eligibility requirements. Note if the clients are at-risk and/or an under-served population, and explain why.

THT's eligibility requirements for our Meals On Wheels program include the following:

- ~ Is a resident of Santa Clara County,
- ~ Is over age 18 or older,
- ~ Is homebound (including being unable to shop for food and unable to access congregate meal programs),
- ~ Is at nutritional risk (e.g., unable to shop or prepare food for themselves), and
- ~ Is willing and has the mental/physical capacity to participate in the program.

Clients supported with funding from the City must meet the additional eligibility requirements:

- ~ Is a resident of Sunnyvale and
- ~ Is low-income (per HUD guidelines).

Clients served by this program are those otherwise AT-RISK of not having sufficient food to meet their basic needs and being unable to meet those needs on their own because they are homebound. This is an underserved population: as detailed below, no other program provides daily meal deliver for this fragile population.

4. What other private or public organizations are now, or will be, addressing the same needs as the proposed program? List and describe the services provided by each agency to address these needs. Explain how the proposed program augments rather than duplicates the services of others. Describe how your agency collaborates with similar or complimentary service providers.

THT works closely with other local food delivery programs to prevent duplication of services and ensure that clients receive the services they need. NO OTHER PROGRAM in Santa Clara County provides hot, home-delivered weekday meals and chilled weekend meals to residents who require the support of fully-prepared food services on a daily basis. NO OTHER PROGRAM offers any home delivery of meals to disabled adults who are younger than 60. Three other programs do offer meal services for seniors (60 and over), but only for those who can prepare meals for themselves or are not homebound: the Council On Aging (frozen meals), Second Harvest Food Bank (weekly groceries), and Senior Nutrition Program (congregate meals). On occasion, the Senior Nutrition Program arranges meal delivery for a fee (not an option for low-income residents). Without THT's Meals On Wheels program, our clients would most likely experience hunger, resulting in poor health and/or being forced to give up their independence and to move to institutional care or assisted living. THT also collaborates with key funding partners for this effort, such as SCAN Health Plan and The California Wellness Foundation.

5. Describe any direct, quantifiable cost savings your proposed program would generate for the City, such as reducing a need for city services, (police, etc.). Attach any reports or other documentation supporting your estimates of city savings. Do not include cost savings to other public or private entities (county, state, federal agencies, or businesses).

THT's services have the potential for direct cost savings for the City. For example, our drivers submit over 50 Wellness Check reports each month which are immediately addressed in order to verify client safety. Oftentimes, the Wellness Check begins when a client does not answer the door. Based on what is pre-determined with the client, an emergency contact may be called or the driver may enter the home. Drivers have found clients who have fallen, been trapped in their bathtubs, or had medical emergencies. Although emergency personnel are frequently called in these situations, the situation does not always require such a call – because the driver has found the client before this is necessary. Drivers have also found home hazards (e.g., unattended pots on the stove) which could cause harm to residents or damage to property. According to a 2010-2011 County Civil Grant Jury Report (attached), the average cost per Sunnyvale Fire Department service call is \$3,437. If even seven significant emergency response calls were prevented annually, an estimated \$24,059 would be saved.

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6. Number of unduplicated clients estimated to be served by the proposed program in next fiscal year (must be consistent with Section 1.C).

Sunnyvale Clients: 40 Total Program Clients: 600

a. If the agency currently receives Sunnyvale funding, will the amount requested for FY 2013-14 result in an increase in the number of Sunnyvale clients currently being served by the agency?

Yes No (If Yes, continue, if No, go to "B. Objectives")

b. How many additional Sunnyvale clients are expected to be:

Extremely Low Income 0 Very Low Income 0 Low Income: 1

Please complete the table below, using actual client data from prior years; only for the specific program for which you are requesting City funds:

Time Frame	Number of Sunnyvale Clients Served	Total Number of Clients Served	Amount of Sunnyvale Funding Received, if Any	Average Annual Program Cost Per Client
Average of past 5 years	49	672	\$8,911.00	\$1,687.00
FY 2011-12	39	508	\$6,551.00	\$1,985.00
Estimated for FY 2013-14	40	600	\$11,744.00	\$1,468.00

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Please provide the number of unduplicated Sunnyvale clients served by income level and special needs, if any:

	2011-2012 Actual	2012-2013 Proposed		2011-2012 Actual	2012-2013 Proposed
	SUNNYVALE ONLY			SUNNYVALE ONLY	
Extremely Low Income (0%-30% AMI)	11	11	Youth (0-18 years)	0	0
Very Low Income (31%-50% AMI)	0	3	Adults (19-61 years)	4	5
Low Income(51%-80% AMI)	0	1	Seniors (62+ years)	7	10
Moderate Income (81%-120% AMI)	0	0	Disabled Individuals	(11/all above)	(xx/all above)
Above Moderate Income (120%+ AMI)	0	0	Other Special Needs	0	0
Total	11	15	Total	11	15

B. Objectives

For each program objective, please indicate the proposed type and number of units of service to be provided during the next fiscal year. Units of service are those units that will be used to calculate program performance and justify reimbursement requests. You must include at least one type of unit, and may include up to four types.

Objective (unit of service) e.g. hours of service, meals provided, evictions prevented, etc.	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
Home-delivered meals*	500	500	500	500	2000
Wellness Check with each meal delivery*	450	450	450	450	1800
Wellness education resources*	9	9	9	9	36
(*Units of Service for 15 Sunnyvale clients)					

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C. Program Administration and Monitoring

1. Use the table and space below to briefly describe how the program will be managed and administered, including proposed staff time and staff functions.

Position Title	Program Duties	Total Annual Salary	Total Hours per Week	% Time Allocated to Sunnyvale Grant Activity	Amount of Salary to be funded by grant, if any
(1) Meals On Wheels Program Director	Direct program management, volunteer coordination/support	75,173	40	5%	4,000
(2) Meals On Wheels Program Coordinator	Direct support services, intake, Wellness Checks	51,272	40	3%	3,000
(3) Meals On Wheels Program Coordinator	Direct support services, food/meal ordering	25,636	20	3%	1,000
(4) Meals On Wheels Drivers	Direct delivery of food, conducting Wellness Checks	9,116	12	100%	0
(5) Vice-President of Program Services	Supervision/coordination of direct service team	126,861	40	1%	0

THT's Meals On Wheels team members are currently in place and have the capacity and experience to provide exceptional services. In particular, (1) has been managing program activities since 2008: with more than 10 years of food service supervision, she is ServSafe certified and a registered dietetic technician. In addition, (5) has over 20 years of management experience in health and wellness agencies, including 4 years with THT. Additionally, this program benefits from the involvement and commitment of approximately 150 volunteers each year.

2. How will the effectiveness of your program be measured during each year of the grant?

THT's Meals On Wheels team works to provide food and support services to help homebound frail elderly and disabled adults remain independent and in their own homes for as long as possible. These services support our clients' quality of life by addressing basic food needs, providing social interaction, and offering additional health and wellness resources. To measure the effectiveness of our program, both process (i.e., outputs) and outcome (e.g., client satisfaction, impact) information is collected.

~ PROCESS: The effectiveness of our services will be measured by the degree to which we meet our service delivery goals for the number of meals provided and the number of clients to be served. This information is tracked using our sophisticated SERVtracker database software. Process goals for use of City funds include providing 2,000 meals to 15 unduplicated Sunnyvale residents during the coming year (Objectives, above).

~ OUTCOME: THT uses a twice-annual client survey to measure the impact of our Meals On Wheels program services on clients. The benefit to clients will be measured by the degree to which we reach our annual outcome objectives that (1) at least 90% of surveyed clients will report that the program is critical to their ability to remain independent in their own home and (2) at least 90% of surveyed clients will report that the program is important for their daily well-being. As shared in our most recent report to the City, 99.1% of clients who participated in our most recent client survey reported that the program helped them to regain or maintain independence in their own home, and 98.7% reported that the program had a positive effect on their daily well-being.

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3. Describe your policies and procedures for assuring that people with disabilities and/or limited English proficiency have equal access to services and benefits. Attach your agency's Language Access Policy and disability-related policies, if any.

THT administers a Language Access Plan (enclosed) to ensure access for applicants and clients with limited English proficiency. As an agency, THT is focused on ensuring access to services for all County residents. To accomplish this, our staff members and volunteers are recruited and trained to support the diverse needs of the region's ethnically/linguistically diverse population and to support low-income and disadvantaged client populations. The Meals On Wheels program team (including staff members, interns, and volunteers) include individuals who are able to support Spanish, Vietnamese, Chinese, and Tagalog speakers. This team includes individuals who identify as being Latino/Hispanic, Caucasian, African-American, Asian, Pacific Islander, and/or LGBTQ. As an agency, THT staff members are available to support clients who speak Spanish, Vietnamese, Chinese (Cantonese and Mandarin), Japanese, Hindi, and Tagalog. While the vast majority of clients who do not speak English at home are not monolingual, THT uses CyraCom for additional language translation needs. CyraCom offers over-the-phone interpretation (OPI) in over 170 languages, and the company is exclusively endorsed by the American Hospital Association for its translation and interpretation services.

4. Provide a brief general description of your agency and the services it provides. Describe your agency's experience in providing the proposed services. If previously funded by the City, what goals and accomplishments were achieved with City funds?

Founded in 1996 from the sale of three local nonprofit hospitals, THT is a charitable 501(c)(3) nonprofit operating foundation serving Santa Clara and northern San Benito Counties. Our MISSION is to lead the Silicon Valley community to advance wellness. Our VISION is to make Silicon Valley the healthiest region in America – and a place where every resident can achieve optimal health throughout their lifetime, irrespective of their background, income, race, ethnicity, or age. Our Meals On Wheels program was established nearly 25 years ago as part of the Visiting Nurses Association. When THT was established in 1996, Meals On Wheels became a program of our organization. With over two decades of experience, this program has the expertise to ensure consistent, quality services for frail elderly and disabled adults. These services remain crucial to our homebound beneficiaries: over 70% of Meals On Wheels clients live alone, and more than 50% have no friends or family nearby. The commitment and involvement of both staff and over 150 Meals On Wheels volunteers help to ensure ongoing services. During the recently-completed fiscal year, 67,127 meals were provided to 508 clients; and 39,453 meals have already been provided to 446 clients during the first seven months of 2012-2013.

5. Explain how your agency collects client eligibility and demographic data, consistent with CDBG requirements for public services programs. Attach a copy of your client application or income verification form.

Client eligibility and demographic data is collected through our client application/intake procedures and through social worker verification of income (client self-verification). Overall, 72% of all Meals On Wheels program clients served by THT are low-income. However, THT maintains a Waiting List of eligible applicants who are waiting to be added to services. Reducing the time that a potential client may spend on the Waiting List is dependent upon community support and program funding. An increased contribution from the City of Sunnyvale will help to address this increasing need for ongoing daily meal delivery and support services. Please find enclosed a copy of our Client Intake form.

D. Consolidated Plan Goals

Please indicate which Consolidated Plan Goal(s) will be met by the Program and briefly describe how your Program meets the Goal(s).

- Goal #2:** Support activities to end homelessness
- Goal #3:** Support activities that provide basic services
- Goal #4:** Promote fair housing choice
- Goal #5:** Expand economic opportunities for low-income households.

THT's Meals On Wheels program provides Basic Services: by providing regular nutrition (food), the program assists low-income, homebound frail elderly and disabled adults to improve their daily living environment and help them maintain independence in their homes.

E. HUD Performance Measures

HUD required that recipients of federal funding assess the outcomes of their programs. Please identify which HUD objective and HUD outcome will be addressed by your proposal.

Objectives

- Objective #1: Creates a suitable living environment.** This objective relates to activities that are designed to benefit communities, families, or individuals by addressing issues in their living environment (such as poor quality infrastructure) to social issues such as crime prevention, literacy or elderly health services.
- Objective #2: Creates economic opportunity.** This objective applies to the types of activities related to economic development, commercial revitalization, or job creation.

Outcomes

- Outcome #1: Improve availability/accessibility.** This category applies to activities that make services, infrastructure, public facilities, housing, or shelters available or accessible to low/moderate income people, including persons with disabilities. In this category, accessibility does not refer only to physical barriers, but also to making the affordable basics of daily living available and accessible to low/moderate income people where they live.
- Outcome #2: Improve affordability.** This category applies to activities that provide affordability in a variety of ways in the lives of low/moderate income people. It can include the creation or maintenance of affordable housing, basic infrastructure hook-ups, or services such as transportation or day care.

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SECTION 3: FINANCIAL AND OTHER ORGANIZATION INFORMATION

A. Agency Information

Non-Profit with 501(c)(3) Status : Yes _____

Faith-based organization: No _____

Community Based Development Organization (CBDO): No _____

Community Housing Development Organization (CHDO): No _____

Other Type of Organization: No _____

Describe: n/a _____

DUNS Number: 011506016 _____

B. Total Agency Budget

	2012-13	2011-12	2010-11	2009-10
Administration	\$1,813,424.00	\$2,291,763.00	\$2,148,753.00	\$1,992,729.00
Fundraising	\$434,617.00	\$549,259.00	\$546,366.00	\$616,660.00
Proposed Program (Total Budget)	\$881,042.00	\$1,008,210.00	\$1,132,217.00	\$1,050,238.00
All Other Programs	\$9,664.00	\$12,319,412.00	\$11,525,199.00	\$12,261,318.00
Total Agency Budget	\$12,793,906.00	\$16,168,644.00	\$15,352,535.00	\$15,920,945.00

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C. Budget for Fiscal Years 2013-14 & 2014-15

Proposed Sunnyvale Program Annual Expenses*	City Funds	Matching Funds	Total
Salaries/Benefits/Payroll/Taxes	\$9,050.00	\$351,509.00	\$360,559.00
Office Supplies	\$125.00	\$7,342.00	\$7,467.00
Communication	\$75.00	\$5,398.00	\$5,473.00
Publications/Printing/Advertising	\$75.00	\$461.00	\$536.00
Travel	\$275.00	\$31,424.00	\$31,699.00
Rent/Lease/Mortgage	\$400.00	\$27,915.00	\$28,315.00
Utilities	\$0.00	\$12,414.00	\$12,414.00
Insurance	\$0.00	\$7,476.00	\$7,476.00
Equipment Rental/Maintenance	\$0.00	\$377.00	\$377.00
Audit/Legal/Professional Services (for CDBG portion only)	\$0.00	\$3,937.00	\$3,937.00
Direct Services (Funding for specific service, e.g. meal, ride)	\$5,000.00	\$304,900.00	\$309,300.00
Contract Services	\$0.00	\$27,054.00	\$27,054.00
Other	\$0.00	\$86,435.00	\$86,435.00
Total Expenses	\$15,000.00	\$866,042.00	\$881,042.00

* Round to the nearest whole dollar and include only expenses associated with proposed program and Sunnyvale clients.

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Proposed Funding Sources for Sunnyvale Program	Amount
City of Sunnyvale	15,000
Other Jurisdictions	0
Foundation	130,000
Individual Donations	200,523
Corporations	65,000
Council On Aging	54,000
(See note below)	
TOTAL	464,523

1. Does your Organization have a HUD-approved indirect cost plan? Yes No
2. Does your agency charge any fees for the proposed Sunnyvale services? Yes No
3. If your organization is not leveraging the requested City funds with other funds, please explain why.

Not applicable: THT is leveraging the requested City funds with other funds. To support this program, we seek resources from foundations; corporations; individual donors; and government entities, such as the City of Sunnyvale.

~ AVERAGE COST PER CLIENT: Please note that the AVERAGE COST PER CLIENT has been calculated using the formula provided by the City and does not reflect the variation in number of meals each client receives: some clients receive a full year (365 days) of services, while others may only receive services for a few days or weeks. The total per-meal cost is currently \$10.30. This dollar amount includes the cost of food, delivery, and support services.

~ MATCHING FUNDS: The Health Trust's TOTAL Meals ON Wheels Program Budget is \$881,042 for the current year. The difference between this total program cost and the MATCHING FUNDS amount above primarily includes funding from other jurisdictions (e.g., cities and the County of Santa Clara) which cannot be used in the City of Sunnyvale. Additional expected grants and individual donor contributions have not been included above because they did not meet the grant guidelines criteria of having been received for this program for at least the past ten years.

~ NOTE: THT has recently received financial support towards the food/meal costs for this program, but the costs associated with meal delivery or other services is not covered through this new funding source. Because of this targeted funding, the proposed budget and service levels vary from previous applications to the City.