

San Antonio Food Bank

Member Agency Guidebook



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San Antonio Food Bank - Member Agency Guidebook

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In order to maintain membership with the San Antonio Food Bank (herein referred to as SAFB), agencies must meet the following minimum requirements. Failure to comply with the guidelines in this Member Agency Guidebook may result in a change of privileges with the SAFB including reorientation, suspension, and / or termination of membership.

Section 1: Organization Criteria

- 1.0** Each agency must be designated a 501(c)(3) umbrella organization. A copy of the 501(c)(3) determination letter or a letter of affiliation or affirmation must be submitted to the SAFB before membership can be activated. Any changes in this designation must be reported to the San Antonio Food Bank immediately and may affect partnership with the SAFB. A copy of this letter of designation by the IRS will be kept on file at the SAFB.
- 1.1** An agency that is a church, or a program directly sponsored by a church, may use the non-profit designation of the parent affiliation of that church. In such cases, the agency must submit a letter on the church's letterhead affirming that the program is directly associated with that church and that the church is affiliated with the parent organization. In such cases where an agency is being sponsored by an umbrella organization, the sponsoring agency with the 501 (c) (3) must sign the agency application in the designated place, sign off on the Member Agency Guidebook, and attend all SAFB pre-training required of agencies.
- 1.2** Only authorized agencies may qualify to partner with the San Antonio Food Bank. Authorized agencies include churches, social service organizations, licensed non-profit daycares, senior centers, licensed foster care agencies, group homes, shelters, and soup kitchens.
- 1.3** In the event of a disaster situation or of a specified event, the SAFB reserves the right to partner with agencies and organizations that may not traditionally meet the requirements of the SAFB. Further, the SAFB reserves the right to expedite the membership of an agency for these purposes, if deemed appropriate and necessary.
- 1.4** The SAFB reserves the right to refuse service to any organization that does not meet the minimum requirements of the SAFB, does not correlate with its mission statement, or does not abide by the SAFB's policies and procedures as listed in this guidebook.
- 1.5** The SAFB reserves the right to revoke the membership of any partner agency for reasons mention in this Member Agency Guidebook or for any reasons determined by the SAFB.

Agency Categories

- 1.6** Prior to approval each agency must identify which agency category best fits their distribution plan. Although this agency status can be revisited and modified as needed, a determination must be made before the agency is approved to partner with the SAFB. Category requirements and benefits are listed below.

Super Pantry

A Super Pantry meets the following requirements:

- Is open to all clients and does not enforce zip code / geographical requirements
- Is open at least 3 times a week
- Is open for at least 4 hours on every distribution day
- Utilizes 50% or more of all services offered by the SAFB to include Nutrition Education, Social Services, Children's Programs, HOPE Program, Community Kitchen, Community Garden, etc.

Benefits to Super Pantries include:

- Access to ordering and picking up product 2 times a week on an appointment basis
- Unlimited access to shopping in the Agency Store during normal store hours of operation which are posted in the Store
- One monthly supplemental delivery of product to the pantry location at no cost to the agency; product will be selected by the SAFB
- One food fair per quarter for Super Pantry clients and other clients referred to food fair by SAFB
- An honorary seat on the SAFB Agency Relations Committee

Emergency Food Pantry

An Emergency Food Pantry meets the following requirements:

- Is open a minimum of 2 times a month to offer food assistance to clients
- Is open to the general public, but may have geographical restrictions
- Is available to come in on an emergency basis to provide assistance to clients outside of regular service days

Benefits to Emergency Food Pantries include:

- Access to ordering and picking up product 1 time a week on an appointment basis
- Ability to schedule additional pick up days and shopping times, when necessary
- **PLEASE NOTE:** If the pantry is open every week, they may shop an unlimited number of times during normal Store hours (which are posted in the Store)

Food Pantry

A Food Pantry meets the following requirements:

- Is open a minimum of once a month to offer food assistance to clients
- Is open to the general public, may have geographical restrictions

Benefits to a Food Pantry include:

- Access to ordering and picking up product 2 times a month on an appointment basis
- **PLEASE NOTE:** If the pantry is open every week, they may shop an unlimited number of times during normal Store hours (which are posted in the Store)

Closed Site Food Pantry

A Closed Site Food Pantry meets the following requirements:

- Is open to serve only internal clients based on the population they serve
- “Closed Site” status has been approved by the SAFB prior to serving only their clients

Benefits to a Closed Site Food Pantry include:

- Access to ordering and picking up product 1 time a week on an appointment basis and based on the number of clients they are serving subject to discretion of the SAFB

Congregate Feeding Site (includes Soup Kitchens and Shelters, Daycares, and Residential Facilities)

A Congregate Feeding Site meets the following requirements:

- Serves prepared meals onsite
- Meets all SAFB requirements such as inspections and licenses to serve prepared meals onsite

Benefits to Congregate Feeding Sites include:

- Access to ordering and picking up product 2 times a week on an appointment basis
- Unlimited access to shopping in the Agency Store during normal Store hours of operation (which are posted in the Store)

Food Fair Site

Please note that Food Fair Sites apply only to agencies outside of Bexar County, schools in any SAFB service county, and Super Pantries in the SAFB service area.

A Food Fair Site meets the following requirements:

- Distributes food / product for anywhere from 150-500 families per distribution
- Accommodates approximately 20 pallets of product and a large quantity of vehicles (100-500) in an orderly fashion
- Provides volunteers (10-20) to assist in product sorting and distribution to vehicles
- Distributes vouchers to pre-qualify families to go through the food fair

Benefits to Food Fair Distribution Sites include:

- Food / Product is delivered to the site and off loaded from the truck
- SAFB staff provide initial guidance and training on how to efficiently facilitate a food fair
- Food / Product is free to the agency

Animal and Wildlife Pantry

An Animal and Wildlife Pantry meets the following requirements:

- Services only animals, whether wild or domestic, and the families that own them

Benefits to Animal and Wildlife Pantries include:

- Access to pet food / food for animals from our warehouse
- Access to a recycled foods program for wildlife animals
- Access to other product that is reasonably used in the maintenance of pet / wildlife Facilities

Non-Food Pantry

A Non-Food Pantry meets the following requirements:

- Access to and distribution of only non food items from the SAFB

Benefits to a Non-Food Pantry include:

- Access to non food items through the SAFB Warehouse

Seasonal Partners

A Seasonal Partner is one that meets the following requirements:

- Partners only with the SAFB for specified seasons or events as approved by the SAFB
- Has access to product appropriate for said events / season as approved by SAFB

Benefits to a Seasonal Partner include:

- Ability to maintain access to SAFB product at specified times throughout the year
- Ability to schedule order appointments / shopping times during these active events / seasons

Section 2: Agency / Program Requirements

Physical Environment

- 2.0 The agency must meet safe food storage and handling requirements based on inspection from the SAFB and the agency's local Health Department.
- 2.1 A food pantry or soup kitchen may not be located in a private residence or a home. The only exception to this requirement is in the event of a foster home, group home, or shelter, where people who are receiving services reside.
- 2.2 The agency's food may not be stored at a location that is remote from its distribution site. *If space at a distribution site is limited, the agency should only order the amount of food it is able to store.*
- 2.3 The area where product is stored should be free of rodents and insects. Pest control must be done routinely, a minimum of once every 90 days and proof must be maintained at the agency for a minimum of 3 years and 90 days. Proof of pest control treatment provided to SAFB staff upon request.
- 2.4 Glue traps and poison bates are not appropriate for treating rodent and pest issues.
- 2.5 The site must be a business location that is locked and secure so only individuals who are trained in SAFB procedures have access to product.
- 2.6 If the location is storing refrigerated and frozen product, there should be clean refrigerators and freezers in order to appropriately store this product. Each refrigerator and / or freezer should have a thermometer to gauge temperature on a regular basis. Fridge and Freezer logs must be filled out a minimum of once a week to ensure that equipment is working properly.
- 2.7 All food product should be stored a minimum of 6 inches above the ground. Appropriate storage solutions include pallets, crates, shelves, and tables, and there should be no contact paper or any type of drawer liner that can attract mold and dirt.

- 2.8 All cleaning products must be stored separately from any food items. If not, every accommodation should be made to store cleaning items below food products.
- 2.9 The exterior of the building where the food is stored must also be well kept tidy. The yard must be kept so as to not attract rodents and / or pests.
- 2.10 All trash cans must be covered and removed from close proximity of the food storage area.
- 2.11 The food storage area must pass routine inspections. Failure to pass an inspection may result in suspension until all issues are remedied to the satisfaction of the SAFB (or health department, if applicable).
- 2.12 The SAFB requests that all agencies submit a picture of the outside of the facility where the food will be stored as well as the actual pantry / room where the food will be stored. This must be submitted prior to approval.

Food Safety

- 2.13 Insulated containers must be utilized to transport and store refrigerated and frozen product.
- 2.14 Repackaged items must be clearly labeled and marked with the name of the item, ingredients, manufacturer, and net weight. DO NOT, under any circumstances, repackage USDA commodities.
- 2.15 Agencies preparing and serving meals must obtain a health inspection from their local health department on an annual basis and pass this inspection.
- 2.16 Agencies preparing and serving meals should have an individual with an updated food handler's certification supervising the preparation and serving of food items.
- 2.17 Food items obtained from another source must maintain the same health standards as product obtained from the SAFB.
- 2.18 Food items should be rotated and disposed of properly based on appropriate discard dates. Baby food and formula should never be utilized after the expiration date on the container.
- 2.19 Perishable foods are any food that requires refrigeration, or is frozen. Although fresh fruits and vegetables generally benefit from storage under refrigeration, fresh produce is not included under this section. If any agency wishes to receive perishable foods from SAFB, the agency must meet the following criteria:
- The agency must have an adequate number of appropriately insulated containers to transport refrigerated or frozen products from SAFB.
 - Refrigerated and frozen products must be stored at safe temperatures: *Below 40° for refrigerated, and below 0° for frozen items.*
 - All refrigerators and freezers must be equipped with thermometers. Temperatures should be recorded at least once weekly. Temperature logs should be made available to the SAFB representative during a monitoring visit. **Form E**
 - Thawed perishables must be cooked or eaten immediately after thawing and *never* refrozen unless cooked first.

An agency that provides prepared meals must meet all state and local health department regulations and must hold all applicable licenses. The agency should keep a copy of the most recent health report on file, and ensure that all corrective measures specified during such inspections are completed within the timeframe given. Copies of licenses and inspection reports must be provided to SAFB on request. The agency must immediately notify SAFB of any changes in its status.

- A member of the agency staff must be a certified food manager, or have received food-handling training from an accredited school or the local health department.

- The agency must designate a sink to be used for hand washing by all staff and volunteers who handle food. This sink cannot be used for food preparation, and must be clearly labeled with a sign instructing staff and volunteers to wash their hands.
- Prepared foods must be cooked, reheated, and held for serving at safe temperatures: 160°F or higher for cooking and 140°F for holding. A probe thermometer should be used to accurately monitor the temperature of the food.
- All frozen foods must be thawed in the refrigerator and cannot be refrozen unless fully cooked at the appropriate temperature. The food should be placed in a pan to catch drips while thawing.
- Repackaged or opened food must be stored in rodent and insect proof containers and labeled with the name of the item and the date the package was opened.
- Leftover food that has been held at 145° can be refrigerated for later use *if* it is placed in *smaller* containers, dated, labeled, and promptly refrigerated or frozen. When reheating these items, the temperature must reach 165° throughout. Once a leftover is reheated and served, any “leftovers of the leftovers” must be discarded.

SAFB Agency Management & Training

- 2.20** All new SAFB programs must be managed by an SAFB trained individual. Individuals must undergo an Agency Orientation and any other training based on specific programs prior to facilitating the program.
- 2.21** If there is a transition in staff, training must occur within two months of taking over the program, unless otherwise specified by a specific program.
- 2.22** Agency staff must participate in a minimum of one additional training opportunity a year to maintain active status with the SAFB. Failure to comply with this training requirement may result in a suspension of privileges with the SAFB.
- 2.23** Agency staff must undergo a Civil Rights training via the mandatory Agency Relations Conference once a year to maintain an active status with the SAFB. Agencies will also be responsible for training all volunteers that will be distributing / serving food through their programs. These trainings should be documented in some way and records may be requested by the SAFB. Failure to comply with this training requirement may result in a suspension of privileges with the SAFB.
- 2.24** Additional training may be identified by SAFB staff, based on program and facility evaluation. These will be clearly identified and communicated to the agency personnel. Failure to comply with this additional training may result in a suspension of privileges with the SAFB.

Other General Policy

- 2.25** The agency is encouraged to form affiliations with other agencies in the community that could improve its efficiency in providing assistance. The agency is encouraged to participate in the Agency Relations Network and the Agency Relations Committee for the purpose of improving inter-agency relations.
- 2.26** The agency should not rely exclusively on the SAFB for its food and non food products. Agencies must make an effort to obtain other sources of food by seeking donations, working with sponsors, and, when necessary, by purchasing from a wholesale or retail store or the SAFB Food Endowment Product.
- 2.27** Under no circumstances should items acquired from the SAFB be shared from one agency to another, regardless of whether both agencies are SAFB partners or not. The agency should refer that organization to the SAFB to apply for SAFB membership. Agencies that knowingly supply SAFB items to any organizations are subject to suspension or termination of SAFB membership privileges.
- 2.28** Agencies are not to refer to their charitable food pantries as “Food Banks”, being that a Food Bank operates in a different capacity than a food pantry.

- 2.29** Agencies may use publicity to promote their programs affiliated with the SAFB. Agencies must seek approval from the SAFB of any information they post, mail, send out as a press release, or publicize in any way. The process for seeking this approval is as follows:
- Create the document / flier you would like to use
 - Submit to the SAFB Agency Relations Department a minimum of two weeks prior to release of the document
 - Await the verbal or written response of the SAFB before you utilize the document
 - Publicize your programs as you see appropriate
 - This process must be used every time you will be publicizing a program unless another agreement is made between the agency and the SAFB

The SAFB logo may only be utilized with the permission of the San Antonio Food Bank.

- 2.30** Agencies must post their hours of operation, pantry rules, a Pantry Bill of Rights, and a Client Bill of Rights. These documents should be posted where clients may readily view. Posted fliers should also be provided to the SAFB for the agency file. **Forms H & I**
- 2.31** Although the SAFB does not determine the hours of operation of its partner agencies, the SAFB expects that the agency will be open a minimum of once a month in order to meet client needs. Agencies may be asked to adjust hours of operation / service days if the area in which they are located is either highly populated with open pantries during that service time or under populated during that service time.
- 2.32** Agencies are required to make determinations on the frequency of service to clients. All clients must be served fairly and equitably. If the determination is to serve clients “once a month” then all clients must be served once a month. As this is an emergency pantry, clients should be informed of the duration of their services. Clients should not be served continually, for an extended period of time, unless their emergency situation still warrants they continue to receive service. Although the agency is responsible for determining this amount of time, the SAFB requires that eligibility criteria be visited a minimum of once a year to determine if the client still qualifies.
- 2.33** Agencies must maintain availability between service days via telephone. Clients and the SAFB staff must be able to contact an agency and receive a response in a reasonable amount of time not to exceed one week.
- 2.34** In order to maintain availability to clients and the SAFB, the agency must have a voicemail system or a messaging system that is operating and checked frequently; and all calls must be responded to in a timely fashion.
- 2.35** All pantries and distribution sites are required to serve every client (referred to them by the SAFB) on their first visit. Clients are thereafter asked to visit a pantry in their area. Clients are referred to agencies outside of their service area based on a lack of resources available in their area.
- 2.36** Agencies participating in varying programs or agency category are required to follow the guidelines of the program and type category which they are operating under.
- 2.37** Any changes to the agency infrastructure of the agency’s physical location must be reported using the Agency Information Change Form. This will ensure that proper changes are made to the agency file and all SAFB information is accurate.
Form F

Section 3: USDA Qualified Agencies

USDA Requirements

- 3.0** USDA commodities are available to SAFB member agencies under the Texas Commodities Assistance Program (TexCAP). Agencies wishing to receive USDA commodities must complete the Eligibility Determination Form and submit it to The San Antonio Food Bank.

Client Eligibility

- 3.1** A food pantry is required to determine the income eligibility of any client who receives USDA commodities for home consumption. Verbal declaration of need or a crisis situation is acceptable; however as with all other USDA clients, verbal declaration of need must include the applicant's name, address, number of persons in the household, statement of income, and signature on the USDA application form. **THE USDA APPLICATION (which is combined with the SAFB Pantry / Family Intake Form) MUST BE COMPLETED AND THE CLIENT'S INCOME MUST FALL WITHIN THE GUIDELINES BEFORE THEY CAN BE CERTIFIED TO RECEIVE USDA PRODUCTS.** A client may not be required to demonstrate proof of any of the aforementioned for the purposes of receiving food product from the pantry. If a pantry offers services other than food, the SAFB does not govern requirement documentation for these additional programs. Although this is a USDA governing requirement, all pantries must adhere to this policy regarding proof / documentation. *(The application form and this year's guidelines have been provided to your agency. Extra copies are available at the SAFB.)* **Forms B & C**
- 3.2** A needy client may be certified for up to one year, so that he or she doesn't have to fill out the USDA application every time he or she receives commodities. **HOWEVER**, the pantry is responsible for ensuring that individuals certified for more than one month at a time remain within the income guidelines. *If a client cannot prove ongoing need, by means of SSI, TANF, Food Stamp Participation, Medicaid, or another objective measure of income, that client must apply on a month-by-month basis. Exceptions may be made for emergency situations on a one time basis. This emergency must be listed in the SAFB documentation in the space provided. Clients falling into this emergency assistance category are eligible for 6 months of assistance from the pantry / distribution site.*
- 3.3** An on-site feeding program that meets the definition of a soup kitchen (open to all who wish to eat) is not required to determine the income eligibility of its clients.
- 3.4** Every recipient household must have an annual household income of not more than 185% of federal poverty guidelines. The current year's guidelines are provided in your orientation packet. These guidelines change yearly. The SAFB will provide new guidelines when they are released or when requested. Exceptions may be made for emergency situations on a one time basis, but this emergency must be listed in the SAFB documentation in the space provided.
- 3.5** If an agency cannot serve a client or household USDA products because the client is ineligible based on income, the agency is required to give the client an "Agency Administrative Review Card" The card will inform clients of their right to contact a San Antonio Food Bank representative to review their eligibility. *(These cards have been provided to your agency. More are available upon request.)*
- 3.6** There may be no exclusion of services based on the race, appearance, age, religion, national origin, disability, gender, sexual orientation, or political affiliation of an individual. In order to understand these rights, all agencies must attend a civil rights training every year.
- 3.7** The agency must have written criteria describing who it serves and must apply those same criterion equally to all individuals served.
- 3.8** The services of the agency may not be restricted to church / agency membership. San Antonio Food Bank resources are available to the community on a qualified basis and all representative agencies should, in turn, be open to the community of qualified individuals. Qualification is based on income guidelines and other criteria designated by the USDA.
- 3.9** The agency may not require any individual to attend a religious or political meeting of any kind in conjunction with receiving services. If the agency regularly conducts such events, they must be conducted at times other than when distributions are taking place; and, it must be made clear to clients that services are not connected in any way to these religious or political meetings.
- 3.10** The agency may not require a client to make a statement of faith or pledge membership to any religious or political organization before receiving assistance. Any and all complaints to this effect will be investigated by SAFB and may result in suspension and / or termination.
- 3.11** All literature that your agency produces announcing the operation of a food pantry, soup kitchen or other charitable food service must include the following statement and be approved by the SAFB prior to being duplicated and distributed:

“There will be no exclusion of services based on the race, appearance, age, religion, national origin, disability, gender, sexual orientation, or political affiliation of an individual. Clients may contact the San Antonio Food Bank at 210-337-3663 to request Administrative Review if they feel they are being wrongly denied service.

- 3.12** Agencies providing USDA commodities to their clients must have appropriate signage posted visible to the clients at the time of intake and receipt of product.

Civil Rights Compliance

- 3.13** Agencies receiving USDA commodities must ensure that recipients of the commodities are not discriminated against because of race, appearance, national origin, age, gender, sexual orientation, disability, political belief, or religion.

- 3.14** All agencies must comply with all federal nondiscrimination requirements, including the following:

Properly display USDA program rules and a USDA approved poster, such as the one titled “And Justice for All”, in areas where commodity program activities take place.

- 3.15** Publicize the availability of the program and eligibility standards at least every two years.
- 3.16** Attend annual civil rights classes at SAFB.
- 3.17** Inform potential recipients of significant program changes on a regular basis.
- 3.18** Send new staff members or volunteers to the San Antonio Food Bank for standard SAFB Orientation.
- 3.19** Provide bilingual material/staff where needed or required.
- 3.20** Properly handle civil rights complaints by providing instructions to the complainant for reaching the U.S. Office of Civil Rights at (512) 438-4313.

Section 4: Use of Food Acquired from The San Antonio Food Bank

- 4.0** Food and grocery items acquired from SAFB must be used in accordance with the policies and regulations of the IRS, local and state health departments, the Second Harvest Network, and The San Antonio Food Bank, Inc.

Charitable Purposes:

The sole allowable use of food received from SAFB is for the care of the ill, the needy, elderly, children and indigent populations to be determined by eligibility guidelines. Any other use may violate IRS regulations.

- 4.1** The agency must utilize SAFB documentation unless otherwise approved by the SAFB. The agency must also have adequate records to document that all items from SAFB are used for charitable purposes.

“In House” use by the Agency:

- 4.2** The agency may not provide donated goods to ill and needy volunteers, and/or to staff. Volunteers and/or staff who legitimately qualify for assistance must be referred to another agency. This includes use in regularly served meals for staff and volunteers, as this may be construed as compensation, in violation of the Federal Labor Law. If the agency is considered a Rural County agency, they may assist their volunteers only AFTER all clients have been serviced and in an equitable amount to all other clients. Documentation must be completed and maintained on any individual receiving product albeit volunteer or client. Areas highly populated with resources in rural counties may be subject to Bexar County policy and this is to be determined by the SAFB.
- 4.3** The agency may pull non-food items (such as toilet paper, soap, cleaning supplies) from inventory to use in its operations, as long as those operations relate to the charitable food service mission of the agency—i.e. soap for hand washing after loading food boxes, or detergent to wash the towels and aprons at a soup kitchen.

Receiving Payment for Food:

- 4.4** The agency may not require a client to make a donation or other payment in exchange for food. The agency may not make an explicit or implicit request for donations (e.g. a collection box on the premises). Legitimate tithing should be done during religious services, which occur separately from distributions. Federal law prohibits the agency from selling or bartering SAFB items and any other donated food. Any organization that requires or receives money, property, or services for the transfer or use of contributed property is in direct violation of the United States Internal Revenue Code Section (e)(3).
- 4.5** The agency may not use SAFB food for fund raising activities (i.e. bake sales, walk-a-thons, concessions, etc.) **EVEN IF THE MONEY RAISED IS INTENDED FOR FURTHER CHARITABLE ACTIVITIES BY THE AGENCY!** Food obtained from the Food Bank may not be bartered, traded, or exchanged for any other item(s) or service(s).

Section 5: Monitoring and Inspection

- 5.0** The agency must pass a periodic mandatory inspection of its food storage and/or preparation areas. New agencies are monitored prior to membership approval and again within one year of becoming an agency. All agencies are monitored on a continual basis thereafter.

SAFB reserves the right to visit and inspect agencies without prior notice.

- 5.1** Corrections or improvements must be made either immediately, or within thirty days of the site visit. If the inspection visit is unsatisfactory and a revisit is necessary, the agency will be revisited again without notice.
- 5.2** SAFB reserves the right to suspend the agency's membership privileges until required corrections are made. An agency in gross violation of SAFB or Health Department policy may be immediately suspended until the problem(s) are corrected.
- 5.3** Agencies who prepare and distribute food must also be inspected by their local health department in addition to the inspection conducted by the San Antonio Food Bank.
- 5.4** Attempts to visit agencies for inspections are made on an availability basis and as courtesy to our agencies. In the event that we are unable to locate an agency to schedule a visit, we will make a written attempt to contact the agency. If we are still unable to contact the agency, we will suspend services until this requirement has been met.

Section 6: Fiscal Management & Accountability

The San Antonio Food Bank is an organization that makes every effort to provide low cost quality food and non-food items to its partner agencies so they may distribute to clients. Products are purchased by the SAFB to supplement donations and are distributed at a reduced cost to the agency. The fee associated with these products is called a "shared maintenance fee". An agency can view this fee as a recuperation of the cost of having a variety of products shipped and stored from all over the country. We hope that these supplemental items (some of which may be referred to as "Value Added Product" or VAP) assist in not only providing food to clients, but meeting their nutritional needs as well.

An SAFB Credit Account, with an assigned account number, will be assigned to newly approved agencies at the discretion of the Agency Relations Department.

Payment Methods:

An agency check is the preferred method of payment, although cashier checks and money orders are also accepted. The agency account number and the invoice number(s) must be included with the payment, either in writing or by enclosing a statement. Front desk staff will not be receipting payments; therefore they must be dropped off in an envelope with all the aforementioned information. Agencies must allow a minimum of 5 working days to enter late payments into an agency account. If the agency has exceeded its credit limit due to this late payment, no purchases will be made until the account has been credited the payment.

- 6.0** The agency must maintain good credit with the SAFB by keeping their agency account current at all times.
- 6.1** New agencies must pre-pay their first three months of service to ensure that they are financially viable and able to meet their financial obligation to the San Antonio Food Bank.

- 6.2** Agencies will be assigned a credit limit that (upon agency's request) will be reviewed after 3-6 months of membership by our Administrative / Accounting Department. Credit limits typically start off at \$250-\$750 based on the size of the partner agency. After successful completion of several months as a member, this limit can be review at the request of the agency. This request must be made in writing and the agency must allow a minimum of 2 weeks for the change to be processed. If an agency exceeds a credit limit due to ordering over the limit or lack of payment, their account will automatically suspend itself until an Administrative Staff Person reviews the account and revises the limit.
- 6.3** The San Antonio Food Bank reserves the right to place a member agency on "Financial Hold" for unpaid balances over 90 days old. Failure to pay within 30 days may cause an interruption in services, if it causes the agency to exceed its credit limit. Continued failure to pay an account in a timely fashion may result in other financial arrangements such as a COD agreement or termination of partnership with the San Antonio Food Bank.
- 6.4** The agency must keep all financial records for a minimum of 3 years. Agency records will be used to assess any changes in account balances and / or other changes to the account. The San Antonio Food Bank does not keep copies of invoices mailed to agencies.
- 6.5** A returned fee of \$25 will be charged on any returned checks. If a check is returned, payment will then have to be made using another form of payment (i.e. cashiers check, money order, cash etc.) If an agency has several returned checks, they may be asked to make payments for an indefinite amount of time using an alternative form of payment.

Section 7: Monthly Reporting and Record Keeping

- 7.0** The agency must maintain adequate client records demonstrating that all items received from SAFB were distributed to the agency's clients. **Forms A & D**

The agency should have the following information on record:

- The total number of clients served per household
- The name and address of each client
- The number of persons in household
- The household income
- Whether the client or a household member receives government assistance
- The client's signature
- And any other information that is requested on the Family Pantry Intake Form and the SAFB Agency Monthly Report

- 7.1** If requested, client records must be made available during SAFB monitoring visits to comply with the requirements of SAFB's food and funding sources. SAFB personnel will protect client confidentiality at all times. Records must also be available to auditors when necessary.
- 7.2** If the agency is receiving USDA commodities, the number of households and/or meals served must be submitted to SAFB monthly on the USDA report. (See Pages 16 & 17 for additional USDA Guidelines)

Agencies are advised to purchase an "accordion" style file folder for all San Antonio Food Bank records; these folders work well and help the agency stay organized so that the staff can concentrate on helping the needy.

- 7.3** All member agencies wishing to receive products from The San Antonio Food Bank are required to submit monthly reports to indicate the number of clients served. This is especially important when the agencies are providing USDA items. The San Antonio Food Bank, in turn, provides information to the Texas Department of Human Services, which reports statewide numbers to the United States Department of Agriculture. Monthly reports are always due by the 5th of the month following the month on which you are reporting. If you have not served any clients, please indicate by marking zero's all the way through the report. If you do not submit a report we will assume that you have forgotten to do so and this may result in suspension of services until all reports are appropriately submitted. **Form A**
- It is advisable that agencies do not wait until the day of their scheduled pick-up to turn in a late report because they will not be permitted to pick up any products until the report is entered in the SAFB database. To discourage this practice, SAFB staff will not "drop everything" to enter a late report into the system, even if that agency has already pulled up to the loading docks.*

Reports may be submitted by any of the following methods:

- Online, at www.safoodbank.org
- Fax to (210) 431-8329, Attention: Services Department
- Deliver to the Food Bank office in person

7.4 Depending on the type of program, either the total number of meals or the number of households served must be provided.

7.5 Agencies must keep all documentation for no less than 3 years. After 3 years, documents that are 3 years or older may be discarded in a manner that protects the confidentiality of clients served.

Section 8: Warehouse Guidelines

8.0 Scheduling: Only the warehouse clerk can schedule or change an agency's product pick-up dates and times. The Agency Relations Department will not make any scheduling arrangements with agencies.

Warehouse Hours of Operation

8:00am - 11:30am

Appointments for pick up outside of these hours may be made by calling in advance and must be approved by the Agency Relations Manager or the Director of Services.

8.1 Warehouse rules:

- No eating or drinking is allowed in the warehouse. This is a Health Department Regulation. Additionally, product ordered and picked up at the SAFB is not for the consumption of agency, staff, or volunteers.
- Please do not bring children. If you do, they may wait in your vehicle. The docks and warehouse are too dangerous for children!
- You must have your agency card in order to pick up product. If you have lost or misplaced your card, you must submit a request in writing for a new card and allow 3-5 business days to process. There will be a \$10 charge for all lost card replacements.
- Only two people from each agency are allowed in the warehouse at a time. These two should only be the cardholder, and one additional member, to assist the cardholder with shopping for, and weighing products.
- All other staff/volunteers must wait outside the warehouse, safely away from the loading docks until it is your agency's turn at the loading dock.

8.2 Ordering: When you submit your order, include: AGENCY NAME, ACCOUNT NUMBER, & PRODUCT PICK-UP DATE.

- Your order is due no later than 12 pm (noon) two business days prior to your pick up date. If your order is submitted late, you will be asked to wait until all agencies who submitted their order have been served or make an appointment for another pick up day based on the availability of the SAFB.
- Fax submissions will not be accepted unless previously approved by the SAFB in circumstances where computer access is unavailable to the SAFB or agency staff.

8.3 Product Pick-up:

- Bring a copy of your order with you.

- Bring your Agency ID card. No card, no product. This is final.
- Take your card to the warehouse clerk's window, give the clerk your card, and then collect a clipboard for your shopping.
- When your items arrive on the loading dock, check to be sure your order is correct and complete. Please do so before loading it in your vehicle! Once you leave the premises with product that your volunteers / staff have signed off on, it is assumed that your order was correct.
- If items are frozen, (especially USDA products) you need a cooler; if it is raining, items must be covered to protect boxed items from rain damage.
- Items ordered and not picked up are subject to a restocking fee for the time taken to pull the order that has not been picked up. This fee is determined by the SAFB and contingent upon the volume of product order and / or the severity of the problem.
- An agency that repeatedly has issues with submitting orders on time, not picking up orders, or other general ordering issues, may have their account suspended at the discretion of the SAFB until their volunteers / staff are retrained on the requirements / policies of the SAFB.

8.4 “Shop-For” Items:

- All items must be weighed and sorted by category. Example of categories: Bakery, Produce, Boxed, Canned, Drinks. Report the gross weight of each category as indicated on the shopping form provided.
- Please be aware that “shop for” items are typically perishables and products that need to be moved very quickly through our agencies.
- Agencies that are open daily or once a week or more, may shop without an appointment at any time during normal hours of operation.
- Agencies open less than once a week can only shop on the days they are picking up their product order.

Warehouse staff does not know the specific items in the assorted food/product “banana boxes” or frozen food boxes. They are distributed by weight, not content.

Not every item you see in the warehouse is available. Some items belong to other agencies, or are set aside for specific use. Warehouse personnel cannot retrieve items from the warehouse that are not specified on the shopping list for that week.

Section 9: Suspension, Termination, and Appeal

9.0 The loss of non-profit, tax-exempt status by the agency will result in immediate termination of membership.

9.1 An agency may be placed on suspension by the SAFB until a specific problem or issue is corrected. While under suspension, the agency will lose its Food Bank privileges, including the right to order and receive food and other products. An agency under suspension may be terminated by the SAFB if the agency fails to correct the within the timeframe provided.

9.2 Reasons for suspension and/or termination include, not limited to:

- Failure to comply with Health Department regulations and with the food storage requirements of the SAFB, or failure to correct food storage problems (within 30 days) found during a SAFB inspection visit. If, at the time of the inspection, the agency is in gross violation of health and SAFB standards the suspension may be immediate, with privileges terminated if the standards are not met within thirty days. Please be advised that this is a case by case scenario to be evaluated by SAFB staff and directors for final decision.
- An indication or report that the agency sells, transfers, or barter for money or services any items obtained from the SAFB, or that the agency charges or is reimbursed for said food.

- An indication or report that the agency requires individuals to attend a religious service or political meeting in order to receive the SAFB food assistance.
- An indication or report that the agency denies services on the basis of race, appearance, age, religion, national origin, gender, sexual orientation, disability, or political affiliation.
- An indication or report that the agency fails to prove or misrepresents the needs of the individuals it serves.

9.3 The procedure for termination of a member agency is as follows:

- Post-investigation, the termination decision will be based on a SAFB staff and Director's final decision.
- A letter will be sent to the agency explaining the specific reasons for the termination and a description of the appeals procedure.
- An agency may appeal the decision to the SAFB Board of Directors by submitting a letter requesting an appeal hearing before the SAFB Board of Directors within ten working days of the date of the notice of termination. If a letter is not received during this time period, an appeal hearing will not be held.
- The SAFB Board of Directors will schedule a time during its next regularly scheduled meeting to hear the appeal. The agency will be notified in writing of when to appear.
- The Board of Directors may suspend SAFB membership privileges of the agency pending the decision if this has not already been done by SAFB staff.
- The decision of the SAFB Board of Directors regarding the appeal is final.
- A letter stating the decision by the SAFB Board of Directors will be sent to the appealing agency within seven working days of the decision.

Section 10: Grievance Procedures

10.0 Grievances Against Member Agencies:

- The SAFB must respond to complaints by the public about any of the SAFB member agencies.
- The Department of Agency Relations will notify the agency, by telephone or visit, of the specific complaint that was received, if deemed appropriate and only for minor issues reported.
- Multiple complaints may result in an unannounced investigation to ensure that the agency is operating as it should be.
- A letter by the SAFB representative will follow the phone conversation, or agency visit.
- The conclusions of the investigation and any recommendations will be presented to the SAFB Executive Director and the Director of Services and will be documented in the agency's file. The agency will be notified in writing of the conclusions and any actions to be taken.
- Civil Rights complaints by the client regarding the distribution of USDA commodities should be documented in writing. The client can address the Civil Rights Office.

10.1 Grievances Against SAFB:

- An agency may submit a written statement of grievance addressed to the SAFB Executive Director. This letter must include the reasons for the grievance, pertinent facts, and what the agency believes would be an acceptable solution to the problem.

- The Executive Director, following study and recommendation from the staff, will determine the plan of action and decision on this grievance within ten working days of receiving the grievance letter. The agency will be notified in writing of the decision.
- The agency may appeal the decision to the Board of Directors. The decision of the Board of Directors is final.

An agency will not be discriminated against, harassed, or suffer any reprisals as a result of filing a grievance. Clients will be offered the same privilege of voicing their opinion without fear of retaliation on the part of the agency.

Section 11: Special Programs

FOSTER CARE PROGRAMS

- 11.0** Foster care agency must provide the SAFB with a license indicating that it is verified and approved by the Texas Department of Family and Protective Services and is in good standing with this governing agency.
- 11.1** Foster care agency must designate a staff person(s) to manage all business interactions existing as a result of partnering with the San Antonio Food Bank including creating pods of foster parents, requesting shopping lists, placing orders, and all financial arrangements.
- 11.2** The SAFB will not maintain any correspondence or contact with a foster parent participating in a pod unless they are employed by the foster care agency.
- 11.3** Each foster parent pod must contain a minimum of 5 families and a maximum of 10 families. Smaller or larger groups will not be accommodated.
- 11.4** Foster care agency must provide a recent and updated health inspection for each foster family participating as well as a license indicating that the family is able to foster by DFPS standards.
- 11.5** Distribution of product within pods must take place at a neutral location or at the foster care agency. Distributions must not occur at a private residence of any type.
- 11.6** Any changes in agency leadership or in the pods must be reported to the SAFB on an Agency Information Change Form immediately.
- 11.7** New staff and families must be trained at an SAFB Orientation prior to actively participating with the SAFB.
- 11.8** Foster care agencies are only eligible to receive specified product from the SAFB to include Endowment and Purchase product and any surplus product designated by the SAFB always with a shared maintenance fee. Foster Care agencies are not eligible for any free product from the SAFB.

NON – PROFIT DAYCARES, RESIDENTIAL LIVING, AND GROUP HOMES

- 11.9** Agency must provide a current Childcare License to indicate that they are an authorized daycare and meeting all minimum state standards.
- 11.10** The Agency must provide any other facility licenses issued to them, as appropriate.
- 11.11** The Agency must provide a Health Department Inspection that is updated and current, a Food Handler’s license that is current for someone supervising meal preparation on site, a Food Permit issued by the City of SA, and any other documents requested to meet the requirements of on site preparation facilities.
- 11.12** Some areas require an Environmental Checklist. If your area is one of these, you must provide this document as well.
- 11.13** The agency must provide a current Fire Department Inspection.

- 11.14** The agency must demonstrate that they are serving a needy population. For non-profit daycares, this means proving a 51% CCDS enrollment.

CLOSED SITE FOOD PANTRIES

- 11.15** The closed site food pantry will have a documented designation as a closed site food pantry from the San Antonio Food Bank. An agency cannot self declare as a closed site food pantry.

ANIMAL AND WILDLIFE PANTRIES

- 11.16** Animal care organizations may have modified policy and documentation as directed by the SAFB.

SEASONAL PARTNERS

- 11.17** Seasonal partnerships are welcomed by the SAFB, but agencies will not be approved for a specific event or holiday. Seasonal partner agencies are defined as agencies that have ongoing seasonal activity with the SAFB.

DISASTER SERVICES PARTNERS

- 11.18** Agencies that rise to meet a need in a disaster situation may be approved at the discretion of the SAFB with abbreviated requirements. In cases such as these, the SAFB has the right to approve an agency without the agency meeting all the minimum requirements. The only requirement that must be met is the 501 C 3 requirement.
- 11.19** A current partner agency requiring assistance from the SAFB, above and beyond their normal partnership parameters in the event of a disaster situation, may make a request using the Disaster Relief Assistance form. **Form G**

MISCELLANEOUS

- 11.20** The agency must provide any documentation requested by the SAFB to determine it's eligibility as a partner agency as well as to provide information regarding the population it is serving.

**San Antonio Food Bank
Agency Guidebook Certification**

By signing this document you are certifying that you have read and understand the policies and procedures of the San Antonio Food Bank. Please know that you and your volunteers / staff are all equally accountable for the information in this guidebook. Some of this information, but not all, has been highlighted in the SAFB Orientation that you must attend prior to becoming a partner agency.

Any violations of the policies and procedures of the San Antonio Food Bank may result in the following:

- Discussion
- Unannounced Investigation
- Suspension or interruption of services
- Termination of partnership with the SAFB

Corrective action will be at the discretion of the SAFB.

Thank you for partnering with the San Antonio Food Bank. This document will become a part of your file and must be mailed as soon as possible to:

**Attn: Agency Relations Department
5200 Old Hwy 90 W
San Antonio, Texas 78227**

I certify that I have read and understand the policies and procedures of the San Antonio Food Bank. I acknowledge that I will follow the guidelines of the SAFB so that I may maintain my partnership with the SAFB and continue to service my clients.

Signature of agency responsible party as authorized by Exec Dir / Pastor

Date

Signature of sponsoring 501 C 3 organization Exec Dir / Pastor

Date

Name of Agency Representing: _____

Appendix A:

Forms and Documentation

Form	Document Name	Description	Used
Form A	Monthly Report	A mandatory report that provides essential statistics and information to the SAFB for reporting purposes. Must be completed monthly and submitted by the 5th of the following month. For example, information for the month of January is to be submitted by the 5th of February.	Monthly
Form B	Food Bank Pantry Family / Individual Intake Form – English	Document used to determine the eligibility of the client as well as gather information for reporting purposes.	With New Clients and Yearly thereafter
Form C	Food Bank Pantry Family / Individual Intake Form – Spanish	Document used to determine the eligibility of the client as well as gather information for reporting purposes.	With New Clients and Yearly thereafter
Form D	Agency Client Sign-In Sheet	Document used to gather information for monthly report as well as track the frequency of client visits	At every distribution
Form E	Fridge and Freezer Log	Document used to track efficiency of refrigerators and freezers present at the distribution sites. Tracking this information will help address any issues that may arise.	Must be completed at least weekly
Form F	Agency Information Change Form	Document used to track any changes made to the agency, whether changes be location, contact information, or volunteers / staff.	Any time there is a change at Agency
Form G	Disaster Relief Assistance Form	Document used to request assistance during a disaster situation.	During a major disaster situation
Form H	Pantry Bill of Rights	Document to post in agency to give clients an indication of the rights of the pantry.	Post in visible sight at location
Form I	Client Bill of Rights	Document to post in agency to give clients an indication of their rights at the pantry.	Post in visible sight at location