



**M E A L S I T E  
C O O R D I N A T O R**

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**Nutrition Programs  
Meal Site Coordinator Foundations  
Facilitator Guide  
May 2019**

## Nutrition Programs: Meal Site Coordinator Foundations Facilitator Guide

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Idaho Commission on Aging

Release Version 1.0

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## **MEAL SITE COORDINATOR FOUNDATIONS SYNOPSIS**

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Ensuring food security, adequate nutritional intake, appropriate socialization and reducing the impact of chronic health conditions is the focus of Older Americans Act nutrition programs. Meal sites deliver these services via congregate and home-delivered meals. The meal site coordinator is responsible for ensuring the goals of the program, its guidelines, the policies of Idaho Commission on Aging (ICOA) and the terms of their contract with their local Area Agency on Aging (AAA) are met. This training provides 15 Focus Areas which identify how coordinators can succeed. Each focus area discusses the why, what, when and how to perform these critical activities in order to prepare coordinators to meet their job expectations.

## **FACILITATOR PREREQUISITES**

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This guide is designed to allow any facilitator, regardless of prior presentation or facilitation experience, to provide an engaging, effective learning session. Following the guidelines and utilizing the resources provided will assist those with little or no prior facilitation experience in gaining confidence and providing a polished presentation for participants. Reviewing the content and flow of the session and exploring listed resources will aid in facilitation of an enjoyable, effective session, meeting the goals of ICOA as well as the needs of participants.

## **OBJECTIVES**

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This session provides participants the opportunity to more effectively understand, prepare for and carry out critical activities related to the successful functioning of their meal site within the OAA Nutrition Program. After participants complete this session, they should be able to:

1. Understand the structure and funding flow of Older Americans Act nutrition programs in Idaho
2. Identify the Focus Areas and related activities necessary to complete them
3. List the specific steps necessary to complete Focus Area activities
4. Formulate a timeline for ensuring Focus Area activities are completed on-time and according to requirements
5. Ensure the Board of Directors understands the nutrition program goals and needs
6. Provide training for staff and volunteers to ensure they can perform their jobs effectively

## **EXPECTED OUTCOMES**

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Meal site coordinators will be able to perform tasks required to manage and maintain a reliable, quality Nutrition Program that complies with all applicable regulations, standards, and expectations. Meal site coordinators are responsible for the management and maintenance of their programs, including the well-being and effectiveness of the staff and volunteers as they provide services to consumers.

## **INTENDED AUDIENCE**

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This session is part of Idaho Commission on Aging's Nutrition Program Education Gateway. The Nutrition Program pathway includes training for Meal Site Coordinators and others. The program, this guide and the related materials are designed to assist facilitators in the effective presentation of the key concepts and techniques related to successful performance as a Meal Site Coordinator. Learning is designed to benefit employees, contractors, and volunteers who provide services through congregate and home-delivered meals managed by the meal site coordinator.

The training is designed to provide Meal Site Coordinators with the knowledge, skills, and attitudes necessary to successfully carry out activities required to provide safe service and adhere to all program requirements. Focus Areas provide 15 specific areas coordinators need to address. The training provides the why, what, when and how for each area, including Guidance and relevant forms as necessary. The presentation, materials, content and related discussions are not intended to supersede methods, procedures or policies dictated by any governing body including but not limited to the State of Idaho Department of Health & Welfare, OSHA and the Administration for Community Living (ACL), or those dictated for a specific job role or environment.

## INSTRUCTIONAL MATERIALS

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- Facilitator Guide (Nutrition\_MealSite\_Coordinator\_FacilitatorGuide)  
*This document. Provides preparation background and tips for reference while preparing for the presentation. Optional.*
- Presentation Outline (Nutrition\_MealSite\_Coordinator\_PresentationOutline)  
*A text-only document providing the slide titles for the presentation. Can be used by experienced presenters as their notes, if they do not require additional presentation support provided by the full presentation script. Optional.*
- Presentation Script (Nutrition\_MealSite\_Coordinator\_Script)  
*A detailed document that includes key concepts, related participant materials, Toolkit items, notes, recommended facilitator actions, discussion ideas, and scripting that can be used to prepare for or during the presentation. Optional.*
- Presentation PowerPoint (Nutrition\_MealSite\_Coordinator\_Master)  
*The slide deck to be used during the presentation. **Required.***
- Slide Deck Personalization Guide  
(Nutrition\_MealSite\_Coordinator\_SlideDeckPersonalizationGuide)  
*This document identifies each slide with its number and title, and what can be personalized on those slides, so they contain and refer to your specific information. Optional.*
- Facilitator Feedback Form  
(Nutrition\_MealSite\_Coordinator\_FacilitatorFeedback)  
*Facilitator evaluation, if web access is not available. **Required.***
- Coordinator Reference Guide (Nutrition\_MealSite\_Coordinator\_CRG)  
*A 1-page document for each Focus Area that summarizes content for that topic. They are combined into the Participant Reference Guide PDF. The appendix contains a collection of forms and sample documents discussed during training. The Participant Reference Guide should be provided to participants either electronically or in hard copy during their training. **Required.***
- On-Site Class Supplemental Materials
  - Roster/Sign-in sheet (Nutrition\_MealSite\_Coordinator\_SignInSheet)  
*To document participant attendance. Optional.*
  - Participant Feedback Form  
(Nutrition\_MealSite\_Coordinator\_ParticipantFeedback)  
*Training evaluation form to use if not providing your own. Optional.*
  - Completion Certificate  
(Nutrition\_MealSite\_Coordinator\_CompletionCertificate)  
*Signed by facilitator and provided to participants after training. **Required.***

## EQUIPMENT/INSTRUCTIONAL AIDS

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- Materials listed above
- Computer
- Projector
- Easel or whiteboard with markers (recommended but not required)
- A prepared facilitator with an excellent positive attitude!

## TEACHING STRATEGIES

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- Lecture (*talk to them*)
- Demonstration (*show them how to use resources, websites and forms*)
- Discussion (*elicit questions*)
- Personal reflection (*ask questions that allow participants to consider their own work environment and experiences*)
- Critical thinking (*ask how they would address specific topics or tasks, ask them to identify if certain examples follow guidelines or could be improved*)
- Evaluation (*ask them to decide whether current processes comply without specifically identifying people or site's that may not be fully compliant*)
- Observation (*interact with participants and evaluate responses to assess their understanding*)



## A SIMPLE METHOD THAT BRINGS AMAZING RESULTS

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The goal of ICOA education is to provide tools so participants can be confident in their ability to perform their jobs safely and effectively. Much of this training is lecture-based, but we want participants to not only be able to recite lists of what they heard, but to be able to apply the concepts and actions to their specific meal site and situations that may arise. We want participants to be able to evaluate situations, plan actions, carry out those activities and then evaluate how effective their efforts were. This requires more than just being provided a checklist. Hands-on activities are not a significant part of this training, but to make it applicable, and elicit higher levels of functionality, we want to provide opportunities to engage in the learning process as much as possible.

When the opportunity presents itself, it is helpful to foster higher functioning by using one of the oldest and most powerful teaching techniques known. It is called the “Socratic Method” after the renowned Greek philosopher. Don’t worry. We’re not going to suggest you take your group out to sit under olive trees and ponder the meaning of life. It simply means that instead of providing “answers” which in this case would be reading through the slides, we can ask questions instead. You’ll allow your audience to use their own personal experiences and frame-of-reference to provide answers. That changes them from “attendees” to actual participants. It also takes a little pressure off of *you*. Talking for 3 hours is difficult and a bit tiring unless you are an experienced presenter. In answering your inquiries, participants will be engaged, and each have the opportunity to contribute, assess, problem solve and evaluate.

A lot of effort has gone into preparing the PowerPoint slide deck for this session. Naturally, you are welcome to use it exactly as described in the outline and script. It contains a lot of valuable information. If you are comfortable doing so, instead of reading the slides verbatim, you can *display* the slide but lead a *discussion* instead.

A simple example might be that after introducing the Nutrition Education focus area, you might ask participants what types of nutrition education they have been providing. If they are new, you can ask what kind of educational presentations they remember and why they were good or not so good. There will be some humorous answers but that is OK as it gets people involved and relaxed. It starts them thinking about their own experiences and what they know, not just what you are telling them. They can use this to determine their own nutrition education materials and presentation formats.

We must meet the session objectives and provide the information contained in the slide deck but doing so in an organic, comfortable way with discussion mixed in is a way to make the information more memorable and applicable. While the slide content is important, and many points should be covered as indicated, we want to prevent “death by PowerPoint” if possible.

While some claim the Socratic approach is a different approach with a similar result to lecture-only presentations, actually, it's NOT the same result at all. Your audience will be more attentive. More importantly, they will have an investment in the session and will retain the information better. The benefit is even greater when you progress to formulating methods of applying the topics to their individual meal sites. Assessing situations, formulating safe procedures and evaluating successful completion are high levels of learning and functioning. Socrates would be so proud!

Remember that any time someone asks a question, like your worst psychoanalyst nightmare, you can reply with, "Well, let's see...what do YOU think?" While we say that here with humor, don't always put off reasonable questions to which there are specific answers. The point is to encourage people to not rely on others to always provide the answers but instead to think through any situation they encounter and formulate their own effective responses.

You will have many opportunities to utilize this method. Socrates was known to conduct "lectures" for days without ever *telling* his students anything. Instead, he only posed questions! Our sessions aren't philosophy classes or advanced degree programs. They're also only a few hours long, so blend some traditional lecture with a dash of Socratic Method and the included videos to provide a dynamic, interesting, effective presentation.

## **ASSESSMENT STRATEGIES**

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- Observation
- Participation
- Appropriate integration of focus area activities into work plan
- Professional practice as indicated by compliance and on-time performance

## **TRAINING EVALUATION**

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Evaluation of the effectiveness and relevance of training is a critical component of any learning initiative. We ask for you to submit the Facilitator Feedback form after each training session. This is important for ICOA to be able to understand how you are using materials and their effectiveness in training. Likewise, a participant evaluation is necessary for both program and presentation assessment.

Since meal sites are contracted by individual AAAs and not ICOA, the AAA will collect participant evaluations following each session. This allows the AAAs to control the format, branding and content as well as manage their data related to delivery.

A Participant Feedback form has been provided as part of the On-Site Class Supplemental Materials. Please feel free to use it. Alternately, please feel free to develop your own evaluation, either paper-based or electronic. ICOA asks that you provide a summary at least annually or when notable feedback is received, so it can be considered when the curriculum is modified or updated in the future.

## **STANDARDS**

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Standards for meal site coordinators are established by, ICOA, the contracting AAA and ACL. Adherence to operations presented here lead to compliance with applicable standards, rules, and laws for nutrition programs in Idaho. It does not claim to address all standards or code. This training does not address standards for food service which are managed by Health & Welfare nor workplace safety standards as defined by the Occupational Health and safety Administration (OSHA).

## **SESSION PREPARATION**

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### **As Soon As Possible**

1. Review Facilitator Guide
2. Review the presentation slide deck, paying particular attention to links and videos (make sure they work as expected)
3. Customize slides with specific information as indicated in the Slide Deck Personalization Guide
4. Investigate topics that may require additional review or knowledge on your part
5. Consider your own experiences so you are able to speak from personal knowledge
6. Identify and write down notes to remind yourself of any relevant examples from the specific work environment. Be sure to take those notes with you when you make the presentation.
7. Decide on a date and arrange for meeting space
8. Order any equipment or room setup that will be required

### **One Month Prior**

1. Confirm meeting space and equipment requests
2. Decide how you will facilitate the training and make any necessary preparations
3. Ensure any materials are available and prepared
4. Send an e-mail meeting invitation or create a printed notice to attendees
5. Print or request prints be made for any hard copy materials you want to use

### **The Week of the Session**

1. Send a reminder e-mail to all attendees
2. Complete certificates for each expected participant. Write legibly.
3. Review the Equipment/Instructional Aids list to be sure you have or have arranged for everything you will need
4. Work with forms and sample documents so you are comfortable with their use
5. If possible, visit the room and familiarize yourself with the lights and equipment

## **The Day of the Session**

1. Arrive early enough to ensure room availability and proper setup
2. Login to the presentation computer
3. Ensure the computer is connected to the projector and the computer displays properly (adjust the projector and focus)
4. Copy all presentation files from the web, network, thumb drive or e-mail
5. Ensure videos from the PowerPoint slide deck play and volume is adjusted correctly
6. Display the first slide from the presentation slide deck
7. Place any necessary sign-in sheets and session materials where attendees can see them when they enter the room
8. Make sure you have a glass or bottle of water easily accessible
9. B-r-e-a-t-h-e and relax before participants start to arrive!

## **CONTENT SUGGESTIONS**

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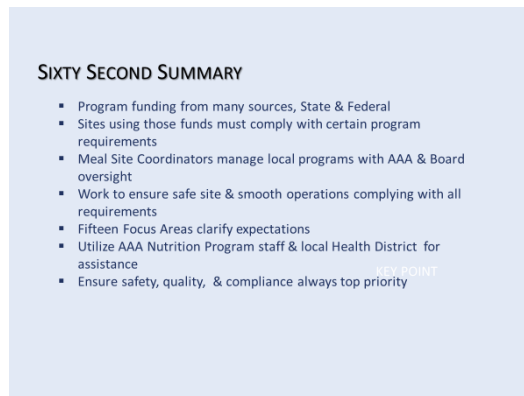
- Use the Slide Deck Personalization Guide to identify which slides you can change to display your own content
- Be sure to modify the last slide in the presentation (“Congratulations”) so it properly indicates how you will collect training evaluations for participants
- Refer participants to the specific page of the Coordinator Reference Guide as you move through the content
- Refer to the Presentation Outline for a text version of the presentation slides
- Use the Presentation Script for a detailed, item-by-item script that can be read or referred to during the presentation
- Feel free to supplement the content, examples and discussion to meet the specific needs, circumstances and frame-of-reference of your audience
- It is important to present all Focus Area slides in order to ensure consistent implementation of the Meal Site Coordinator training program. Do not skip Focus Areas, regardless of perceived participant prior knowledge.
- To prepare, consider and write down in your own notes, the script or on the presentation outline...
  - Questions you want to ask of the participants
  - Possible responses you may receive and how you might respond
  - Specific examples or case studies to which you want to refer
  - Files, websites, images or videos that illustrate or support your examples
  - Discussion starters you want to use at certain points in the session
  - Demonstrations you want to perform
  - Tips relevant to your specific audience, location and/or job roles

## SIXTY SECOND SUMMARY

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Refer participants to their Coordinator Reference Guide. It summarizes the key points covered in the presentation. Remind participants that these are their after-training job aids.

Display the Sixty Second Summary slide. Do not go into any detail. At this point, the details have been covered and participants have had the opportunity to review concepts and techniques through discussions and demonstrations. Read through the bullet points calmly, but relatively quickly.



## TRAINING EVALUATION, COMPLETION CERTIFICATE AND SESSION CLOSE

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- Present the certificates to each participant
- Ask each participant to complete a paper or web-based evaluation
- Conclude with a heart-felt “thank you” for everyone’s participation and attention


## ADDITIONAL RESOURCES

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- Each Focus Area has its own Toolkit that contains all relevant forms and samples provided as part of the training. Remind participants to download the Toolkit and keep it where they can refer to it easily. They can keep it electronically or print hard copies of materials. The materials referenced are already included in their Participant Reference Guide. The toolkit is available from the ICOA website ([www.aging.idaho.gov](http://www.aging.idaho.gov)).
- Remind participants to always adhere to specific policies and guidelines for their site. Also, be sure to follow any updated policies or procedures implemented since this training was developed. Clarify any questions either with the local Health District, Dietician or the AAA Nutrition Program staff.
- Talk to your experienced, *trained*, reliable colleagues from other meal sites


## TERMINOLOGY


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 **Older Americans Act (OAA)**, established in 1965 was the first federal level initiative aimed at providing comprehensive services for older adults. It created the National Aging Network comprising the Administration on Aging on the federal level, State Units on Aging, and Area Agencies on Aging at the local level. The network provides funding - based primarily on the percentage of an area's population 60 and older - for nutrition and supportive home and community-based services, disease prevention/health promotion services, elder rights programs, the National Family Caregiver Support Program, and the Native American Caregiver Support Program.


 **Administration for Community Living (ACL)** is part of the United States Department of Health and Human Services and administers OAA funding and programs.


 **Idaho Commission on Aging (ICOA)** is the State entity derived from the OAA that manages programs for aging Idahoans, utilizing both federal OAA and State funds.


 **Area Agency on Aging (AAA)** is the local provider of services, under contract with ICOA, both for whom are defined by the OAA. Idaho currently has six (6) AAAs.


 A **meal site** is a community-based provider of congregate and/or home-delivered meals. Meal sites provide services by contract with the local AAA, through ICOA and with oversight and funding from ACL and the OAA.


 A **Meal Site Coordinator** is the person at a meal site who has supervisory authority and is responsible for ensuring the compliance of the facility with all regulations, the safety of all staff, volunteers and visitors, and the implementation and promotion of nutrition programs













 **Congregate meals** are served at a meal site and promotes social interaction and nutrition education as well as providing nutritious meals.











 **Home-delivered meals** are provided to homebound individuals who are unable to provide adequate meal preparation for themselves, and are personally delivered multiple times each week, providing face-to-face contact and the ability to assess for additional needs by the person delivering the meal.

 **Homebound** describes a person who is unable to leave their home, usually due to illness, injury or cognitive issues

 **Frail** describes a person who is physically weak and/or fragile

 A **meal provider** is an organization that prepares and delivers congregate and/or home-delivered meals and may do so for more than one meal site.

-  A **focus area** is a task deemed critical by ICOA in order for a meal site to remain compliant with program requirements. There are 15 focus areas for Meal Site Coordinators.
-  A **permit-license** is formal authority, usually from a government entity, to own or use something, do a thing, or carry on a trade. Idaho Health & Welfare provides permit-licenses for food sites.
-  A **health district** is a sub-unit of Idaho Department of Health & Welfare, that provides oversight & services in a designated part of the state, including granting permit-licenses & inspecting meal sites
-  A **corrective action plan** is provided to meal sites that have failed to meet minimum requirements and is designed to assist in correcting the issues by providing guidelines to achieve successful resolution
-  A **non-profit** is a designation intended to differentiate for-profit businesses from those that perform charitable activities
-  **501 (c)3** is the section of the U.S. tax code that defines non-profits and is used for formal determination by the Internal Revenue Service
-  A **Certified Food Protection Manager** is a person who has supervisory authority to identify & correct compliance issues at a meal site and who has passed the nationally recognized exam at least every five years
-  **Supervisory authority** describes a position, usually in the workplace, who can direct the actions & processes of others, especially when corrective actions are necessary
-  The **Nutritional Health Survey** is a 10-question yes/no answer questionnaire that results in a score, identifying whether a person should seek follow-up regarding their health. A score of 6 or higher provides nutritional counseling from a meal site Dietician free of charge.
-  A **roster** is a report, provided by the AAA before the start of each month, generated from GetCare, that lists all registered consumers and volunteers, and used to identify which meals a person has participated in as well as writing in new consumers that register during that time.
-  A **sign-in sheet** is a form provided by ICOA and used to identify visitors only, not registered consumers or volunteers.
-  **Guidance** is a policy, written by ICOA, that must be followed to comply with rules, regulations and/or requirements

-  A **qualified consumer** is a person sixty (60) years or older for congregate meals or 60 years or older plus being homebound, frail and unable to prepare their own meals for home-delivered meals. See Guidance for complete eligibility requirements.
-  A **visitor** is someone who is provided a congregate meal but is either under age 60 or otherwise refuses to register for services.
-  **Reconciled** means that records, often financial in nature, match with those of another source such as the meal site's books and the related bank statement(s)
-  **Supporting documentation** is any type of record (electronic or hard copy) that provides reliable proof that something being referred to is accurate
-  The **Nutrition Services Incentive Program (NSIP)** is a USDA program designed to provide financial incentives for increasing capacity by providing distributions throughout the year that can be used to purchase domestically produced commodities that are used in consumer meals. Funding is based on the number of meals provided in the prior year.
-  **Commodity donated food** is items provided free of charge for use in a nutrition program, including items from the Idaho Food Bank
-  A **meal frequency waiver** is a formal document, prepared by the meal site and AAA and signed by the AAA Director and ICOA Administrator, that relieves a meal site from meeting the minimum number of meals served per week.
-  **Oversight** is the responsibility of a person or organization to monitor another person or organization's activities to prevent omissions and errors usually by monitoring processes and/or outcomes to ensure requirements are met.
-  The **Manual for Non-Profits** is provided by Idaho's Office of the Attorney General, written by Lawrence Wasden, and provides information to help board members of non-profit corporations better serve their organizations
-  **Lawrence Wasden** is the current Attorney General of the state of Idaho serving since 2003, is the longest serving Attorney General in Idaho history, and the 2006-07 President of the National Association of Attorneys General.