

**AMENDMENT NUMBER FOUR  
TO  
CONTRACT NO. MA-012-24011309  
BETWEEN  
COUNTY OF ORANGE  
AND  
COMMUNITY SENIORSERV, INC. DBA MEALS ON WHEELS ORANGE COUNTY  
FOR  
SUPPORTIVE SERVICES**

This Amendment to Contract Number MA-012-24011309, (hereinafter referred to as “Amendment”) is made and entered into upon execution of all necessary signatures, and made and entered into between the County of Orange, a political subdivision of the State of California; hereinafter referred to as “County” and Community SeniorServ, Inc. DBA Meals on Wheels Orange County, D-U-N-S No. 084975739 and UEI# SB9RTCT6FJA5, a non-profit corporation in the State of California, with a place of business at 1200 N. Knollwood Circle, Anaheim, CA 92801 (hereinafter referred to as “Subrecipient”), with the County and Subrecipient sometimes referred to as “Party” or collectively as “Parties.”

**RECITALS**

**WHEREAS**, County and Community SeniorServ, Inc. DBA Meals on Wheels Orange County entered into Contract Number MA-012-24011309 (hereinafter referred to as “Original Contract”), for Supportive Services, commencing July 1, 2024, through June 30, 2025, in the amount not to exceed \$1,128,405; and

**WHEREAS**, on March 11, 2025, Parties executed Amendment Number One to increase Contract Amount by \$156,287 for a new not to exceed the amount of \$1,284,689, replaced General Terms and Conditions – Paragraph BB. Contingency of Funds; replaced Attachment A – Scope of Services; replaced Attachment B – Payment Compensation; replaced Attachment C – Budget Schedule; replaced Attachment D – Staffing Plan; replaced Attachment E – Performance Standards; and replaced Attachment F – Federal Award Identification; and,

**WHEREAS**, the Parties entered into Amendment Number Two to renew Contract for one additional year effective July 1, 2025 through June 30, 2026; increase Contract amount by \$1,284,689 with a new not to exceed amount of \$2,569,378; replace Attachment B-1, Payment Compensation; replace Attachment C-1, Budget Schedule; replace Attachment D-1, Staffing Plan; replace Attachment E-1, Performance Standards; replace Attachment F-1, Federal Award Identification; replace Exhibit 5 – OC Community Resources Contract Reimbursement Policy; and,

**WHEREAS**, the Parties entered into Amendment Number Three to decrease the Contract amount of \$33,372, resulting in a new annual maximum amount of \$1,251,317; replace Attachment B-2 – Payment Compensation; replace Attachment C-2 – Budget Schedule; replace Attachment D-2 – Staffing Plan; replace Attachment E-2 – Performance Standards; replace Attachment F-2 – Federal Award Identification; and

**WHEREAS**, the Parties now desire to execute Amendment Number Four to renew the service term for an additional one-year period, in the annual amount \$1,251,317, effective from July 1, 2026, through June 30, 2027; replace Attachment B-3 – Payment Compensation; replace Attachment C-3 – Budget Schedule; replace Attachment D-3 – Staffing Plan; replace Attachment E-3 – Performance Standards; replace Attachment F-3 – Federal Award Identification; and

**NOW, THEREFORE**, in consideration of the mutual obligations set forth herein, both Parties mutually agree to amend as follows:

1. The Contract amount is hereby renewed for the amount \$1,251,317 for the term effective from July 1, 2026, through June 30, 2027, bringing the new cumulative contract total not to exceed \$3,787,326.

2. County General Terms and Conditions – Paragraph 29. Notices, shall read as follows:

**Notices:** Any and all notices, requests, demands, and other communications contemplated, called for, permitted, or required to be given hereunder shall be in writing, except through the course of the Parties' routine exchange of information and cooperation during the terms of the work and services. Any written communications shall be deemed to have been duly given upon actual in-person delivery, if delivery is by direct hand, or upon delivery on the actual day of receipt or no greater than four calendar days after being mailed by US certified or registered mail, return receipt requested, postage prepaid, whichever occurs first. The date of mailing shall count as the first day.

All communications shall be addressed to the appropriate party at the address stated herein or such other addresses as the Parties hereto may be designated by written notice from time to time in the manner aforesaid.

Subrecipient: Community SeniorServ, Inc. DBA Meals on Wheels Orange County  
1200 N. Knollwood Cir  
Anaheim, CA 92801-1309  
Attn: Holly Hagler, President & CEO  
(o) 714.229.3355 | (e) [hhagler@MealsOnWheelsOC.org](mailto:hhagler@MealsOnWheelsOC.org)

County: OC Community Resources – Office on Aging  
1300 S. Grand Ave. Bldg. B, Floor 2  
Santa Ana, CA 92705

- Attn: Erin Ulibarri, Program Manager  
(o) 714.480.6462 | (m) 949.898.4169 | (e) [erin.ulibarri@occr.ocgov.com](mailto:erin.ulibarri@occr.ocgov.com)  
– *Transportation Services*
- Attn: Farah Lollis, Program Manager  
(o) 714.480.6467 | (m) 657.799.6588 | (e) [farah.lollis@occr.ocgov.com](mailto:farah.lollis@occr.ocgov.com)  
– *Adult Day Care Services*
- Attn: Marco A. Rodriguez, Program Manager  
(o) 714.480.6482 | (m) 714.604.8734 | (e) [marco.rodriguez@occr.ocgov.com](mailto:marco.rodriguez@occr.ocgov.com)  
– *Case Management & In-Home Services*

Cc: OC Community Resources  
Contract Development and Management  
601 N. Ross St., Floor 6  
Santa Ana, CA 92701  
Attn: Diana Lin, Contract Administrator  
(o) 949.585.6464 | (m) 714.227.8458  
(e) [diana.lin@occr.ocgov.com](mailto:diana.lin@occr.ocgov.com)

3. Attachment B-3, Payment Compensation, is hereby replaced with Attachment B-4.
4. Attachment C-3, Budget Schedule, is hereby replaced with Attachment C-4.
5. Attachment D-3, Staffing Plan, is hereby replaced with Attachment D-4.
6. Attachment E-3, Performance Standards, is hereby replaced with Attachment E-4.
7. Attachment F-3, Federal Award Identification, is hereby replaced with Attachment F-4.

8. Exhibit 5(a) – OCCR Contract Reimbursement Policy is hereby removed from the Contract.

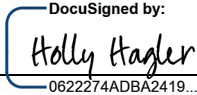
Except as otherwise expressly set forth herein, all terms and conditions contained in the original Contract, including any amendments/modifications, are hereby incorporated herein by this reference as if fully set forth herein and shall remain in full force and effect.

-Signature Page follows-

**SIGNATURE PAGE**

**IN WITNESS WHEREOF**, the Parties hereto have executed this Amendment on the dates with their respective signatures:

**\*COMMUNITY SENIORSERV, INC. DBA MEALS ON WHEELS ORANGE COUNTY**

By:  0622274ADBA2419...

By: \_\_\_\_\_

Name: Holly Hagler

Name: \_\_\_\_\_

Title: President & CEO

Title: \_\_\_\_\_

Dated: 4/13/2026

Dated: \_\_\_\_\_

\*For Subrecipients that are corporations, signature requirements are as follows: 1) One signature by the Chairman of the Board, the President or any Vice President; and 2) One signature by the Secretary, any Assistant Secretary, the Chief Financial Officer or an Assistant Treasurer.

\*For Subrecipients that are not corporations, the person who has authority to bind the Subrecipient to a Contract, must sign on one of the lines above.

**COUNTY OF ORANGE**  
A Political Subdivision of the State of California

By: \_\_\_\_\_  
Deputy Purchasing Agent

Dated: \_\_\_\_\_

**APPROVED AS TO FORM**  
Office of the County Counsel

Signed by:  74000D32EE65457...  
Deputy

4/14/2026  
Dated: \_\_\_\_\_

**ATTACHMENT B-4**  
**PAYMENT AND COMPENSATION**

**I. COMPENSATION**

This is a cost reimbursement Contract between the County and the Subrecipient for up to \$1,251,317 beginning July 1, 2026, through June 30, 2027. The Subrecipient agrees to accept the specified compensation as set forth in this Contract as full remuneration for performing all services and furnishing all staffing and materials required, for any reasonably unforeseen difficulties which may arise or be encountered in the execution of the services until acceptance, for risks connected with the services, and for performance by the Subrecipient of all its duties and obligations hereunder. The County shall have no obligation to pay any sum exceeding the total Contract amount specified unless authorized by an amendment in accordance with Paragraphs C and P of the County's General Terms and Conditions.

**II. BUDGET TERMS**

- A. Detailed Budget: Upon approval by the Orange County Board of Supervisors and/or the County – but prior to submission of invoices, a detailed budget must be submitted to the Office on Aging office for approval. Budget templates will be provided by the Office on Aging through the assigned *Box Folder*. Invoices shall be submitted based upon these detailed budgets.
- B. Budget revisions are changes made to the budget line items on Attachment C.
1. Budget revisions initiated by Subrecipient must be limited to no more than two (2) times per program, per Fiscal Year.
  2. Budget revisions requests initiated by Subrecipient must be submitted no later than 60 days before the end of the contract term.
- C. Budget modifications are changes made to the detailed budget
1. Budget modifications initiated by Subrecipient must be limited to no more than three (3) times per program, per Fiscal Year.
  2. Budget modification requests are approved based on County discretion.
- D. Subrecipient must include a justification narrative specifying the purpose of the revision or modification.
- E. All additional budget revision and budget modification requests initiated by Subrecipient may be denied. Special consideration may be given for extenuating circumstances, but approval is not guaranteed.

**III. PAYMENT TERMS**

Invoices are to be submitted in arrears to the user agency/department. An invoice for the reimbursement of costs shall be submitted as specified below upon the completion of the services/activities and approval of the County. Payment shall be made within thirty (30) days after receipt of a properly prepared invoice in a format acceptable to the County. All invoices shall be verified and approved by County prior to payment and processed in accordance with the County's routine procedures. The responsibility for providing an acceptable invoice rest with the Subrecipient.

Billing shall cover services not previously invoiced. The Subrecipient shall reimburse the County of Orange for any monies paid to the Subrecipient for services not provided or when services do not meet the Contract requirements.

#### **IV. INVOICING INSTRUCTIONS**

- A. Subrecipient shall submit an invoice(s) and other substantiating reports as County may require, all in a form satisfactory to County, by the fifteenth (15<sup>th</sup>) day of each month. If the 15<sup>th</sup> falls on a weekend or holiday, the invoice/data report is due on the next business day. If Subrecipient receives funds pursuant to this Contract for more than one program or Service Area, each such program or Service Area shall be invoiced separately from all other programs or Service Areas, and separate substantiating reports shall be submitted for each program or Service Area, unless otherwise approved by County. County shall make monthly payments based on Subrecipient's data, invoice(s), and substantiating reports, unless otherwise approved by County.
- B. In cases where errors or Disallowed costs are identified by County, County will return invoice(s) for revision. Subrecipient must resubmit revised invoice(s) within five (5) business days of notification from County, excluding the 11<sup>th</sup> month invoice and 12<sup>th</sup> month close-out invoice.
- C. No payments will be made if any preceding months' invoices are outstanding, unless otherwise approved by the County.
- D. No payments will be made for costs incurred by Subrecipient which are determined to be unallowable, in accordance with the applicable Federal statutes, regulations, or the terms and conditions of the Federal award. (2 CFR Part 200.31 and 45 CFR 75.2)
- E. Whenever Subrecipient is not in compliance with any provision of this Contract, County may withhold payment until such time as Subrecipient comes into compliance.
- F. Any late submission for the 1<sup>st</sup> through 10<sup>th</sup> invoices will result in technical assistance finding during program monitoring.

Further instructions regarding invoicing/reimbursements as set forth in Exhibit 5, OC Community Resources Contract Reimbursement Policy, are attached hereto and incorporated herein by reference.

#### **V. CLOSE-OUTS**

- A. The 11<sup>th</sup> month invoice is due on the 10<sup>th</sup> of the 12<sup>th</sup> month of the contract without exception. In cases of returned invoices due to errors or disallowed costs, Subrecipient must resubmit revised invoice(s) within two (2) business days of notification from County.
- B. The 12<sup>th</sup> month close-out invoice is due on the 10<sup>th</sup> of month following the end of the contract term, without exception. In cases of returned invoices due to errors or disallowed costs, Subrecipient must resubmit revised invoice(s) within two (2) business days of notification from County.
- C. Request for invoice revisions from the Subrecipient will only be allowed at the County's discretion.
- D. Subrecipient must submit the 12<sup>th</sup> month invoice estimates by the 10<sup>th</sup> of the 12<sup>th</sup> month of the contract. Estimates must be projected based on anticipated actual expenditure.
- E. Any late submission for the 11<sup>th</sup> and 12<sup>th</sup> month invoices will result in a corrective monitoring finding, without any exceptions. All requests for late submissions or due date extensions will not be granted. A Corrective Action Plan (CAP) will be required to address this finding.

**VI. FULL COMPENSATION**

The Subrecipient agrees that the payment listed in this contract is the full amount they will receive. This payment covers all work, staff, and materials needed to complete the services, including any unexpected issues or difficulties that may arise. The Subrecipient accepts all risks related to the work and agrees to fulfill all responsibilities under this contract for that amount.

**ATTACHMENT C-4**  
**BUDGET SCHEDULE**

Meals on Wheels Orange County  
Supportive Services  
(July 1, 2026 - June 30, 2027)

Service Area(s)
Countywide

**I. Subrecipient’s Budget**

The following Budgets are set forth for informational purposes only, and may be adjusted by mutual agreement, in writing, of Subrecipient and County.

Adult Day Care

Program Costs	\$297,735
Administrative Costs	\$0
AMOUNT NOT TO EXCEED	\$297,735
Total Program Match (Cash and/or In-Kind)	\$35,042

Case Management

Program Costs	\$292,664
Administrative Costs	\$0
AMOUNT NOT TO EXCEED	\$292,664
Total Program Match (Cash and/or In-Kind)	\$34,445

In-Home Services

Program Costs	\$368,996
Administrative Costs	\$0
AMOUNT NOT TO EXCEED	\$368,996
Total Program Match (Cash and/or In-Kind)	\$43,429

Service Areas	
Service Area 1	North
Service Area 2	West
Service Area 3	Central
Service Area 4	Beach Cities

Transportation

Program Costs	\$291,922
Administrative Costs	\$0
AMOUNT NOT TO EXCEED	\$291,922
Total Program Match (Cash and/or In-Kind)	\$34,357

Upon approval by the Orange County Board of Supervisors and/or the County – but prior to submission of July 2026 invoices, a detailed budget must be submitted to the Office on Aging office for approval. Budget templates will be provided by the Office on Aging. Invoices shall be submitted based upon these detailed budgets.

Subrecipient may request to shift funds between programs, or between budgeted line items within a program, for the purpose of meeting specific program needs by utilizing the applicable form provided by County. Subrecipient must include a justification narrative specifying the purpose of the request, the amount of said funds to be shifted, and the sustaining annual impact of the shift as may be applicable to the current Fiscal Year Budget and/or future Fiscal Year Budgets. Subrecipient shall obtain written approval of any budget adjustments from County prior to implementation by Subrecipient.

- II. The above Budget Display is an overview of the actual budget approved by the Office on Aging. Subrecipient shall be responsible for and maintain the approved *Detailed Budget* that is provided to Subrecipient from Office on Aging. The Detailed Budget shall be maintained and completed in accordance with the Office on Aging policies and processes. Any deviation from the Office on Aging approved budget, may and can delay acceptance of budgets and/or reimbursements.
- III. The Detailed Budget must set forth in detail the reimbursable items, unit rates and extended total amounts for each line item. The Subrecipient’s Detailed Budget shall include, at a minimum, the following items when reimbursable and applicable under this Contract:
  - A. Personnel Costs – annual Full-Time Effort (FTE) wage rates and personnel classifications together with the percentage of time to be charged, specified for each program. 2 CFR 200.430 must be followed for rules regarding allowability of personnel costs. Specific emphasis of section (i) of 2 CFR 200.430:
    - 1. Charges to Federal awards for salaries and wages must be based on records that accurately reflect the work performed. These records must:
      - i. Be supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated.
      - ii. Be incorporated into the official records of the non-Federal entity.
      - iii. Reasonably reflects the total activity for which the employee is compensated by the non-Federal entity, not exceeding 100% of compensated activities.
      - iv. Support the distribution of the employee’s salary among specific activities or cost objectives if the employee works on more than one Federal award; a Federal award and a non-Federal award, an indirect cost activity and a direct cost activity; two or more indirect activities which are allocated using different allocation bases; or an unallowable activity and a direct or indirect cost activity.

- v. Budget estimates (i.e., estimates determined before the services are performed) alone do not qualify as support for changes to Federal awards.
- 2. Salaries and wages of employees used in meeting cost sharing or matching requirements on Federal awards must be supported in the same manner as salaries and wages claimed for reimbursement from Federal awards.
- B. Fringe Benefits – specified for each program.
- C. Staff Travel (In-State and Out-of-State travel) – mileage reimbursement, lodging, per diem, and other travel costs, specified for each program.
- D. Staff Training – attendance cost for necessary training, specified for each program.
- E. Rent – total, specified for each program.
- F. Property/Equipment - detailed descriptions and unit costs, specified for each program.
- G. Supplies – to include items that do not qualify as property, specified for each program.
- H. Contractual Costs (Consultants/Professional Services) – cost detail, specified for each program.
- I. Food – used in delivering Congregate and Home-Delivered Meals.
- J. Other – Facilities, operating expenses, and other ordinary and necessary costs specified for each program.
- K. Allocated Direct Costs – requires submission of a Direct Cost Allocation Plan for prior approval.
- L. Indirect Costs – costs incurred for a common or joint purpose benefitting more than one cost objective and not readily assignable as a direct cost.

#### **IV. One-Time Only (OTO) Funds**

- A. OTO funds are non-transferable between funding sources. This means that OTO funds can only be used in the program in which they were accrued.
- B. Titles III federal Program OTO funds shall only be used for the following purposes:
  - 1. The purchase of equipment that enhances the delivery of services to the eligible service population.
  - 2. Home and community-based projects that are approved in advance by OoA and CDA, and are designed to address the unmet needs of the eligible service population identified in the Area Plan.
  - 3. Innovative pilot projects that are approved in advance by OoA and CDA, and are designed for the development or enhancement of a comprehensive and coordinated system of services as defined in 45 CFR 1321.53(a)(b).
  - 4. OTO funds can be used to maintain or increase baseline services. However, Subrecipient shall assure that services funded with OTO funds will not create an expectation of service delivery beyond the current Contract period. Expenditures for baseline services do not require advance OoA and/or CDA approval.
- C. NSIP OTO funds shall only be used to purchase food used in the Elderly Nutrition Program.

#### **V. Matching Contributions**

“Matching Contributions” means local cash and/or in-kind contributions made by the Subrecipient, subcontractor, or other local resources that qualify as match for the Contract funding.

- A. Cash and/or in-kind contributions may count as match, if such contributions are used to meet program requirements.
- B. Any matching contributions (cash or in-kind) must be verifiable from the records of the Subrecipient and the subcontractor.
- C. Matching contributions must be used for allowable costs in accordance with the OMB cost principles.
- D. Match requirement must be fulfilled by the end of the contract fiscal year.
- E. The required minimum program matching contributions for Title IIIB, not including Ombudsman, is ten percent (calculation factor of 10.53%).

- F. Minimum matching requirements are calculated on net costs, which are total costs less program income, non-matching contributions, and State funds. Matching contributions are included in the detailed budget minimum matching requirements calculation.
- G. Matching contributions generated in excess of the minimum required are considered overmatch.

## **VI. Indirect Costs**

- A. The maximum reimbursement amount allowable for indirect costs is fifteen percent (15%) of the Subrecipient's Modified Total Direct Costs (MTDC), per funding category excluding in-kind contributions and nonexpendable equipment.

Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$50,000 of each subaward (regardless of the period of performance of the subawards under the awards). MTDC excludes in-kind contributions, equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$50,000. Other items may only be excluded when necessary to avoid serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs. [45 CFR 75.2]

- B. Subrecipients requesting reimbursement for indirect costs exceeding the maximum fifteen percent (15%) shall retain on file an approved negotiated indirect cost rate or cost allocation plan.
- C. Indirect costs exceeding the fifteen percent (15%) maximum may be budgeted as in-kind for purposes of meeting matching requirements in Title III and VII programs only. Subrecipients must receive prior approval from federal awarding agency prior to budgeting the excess indirect costs as in-kind.

## **VII. Program Income**

- A. Program Income means revenue generated by the Subrecipient and/or its Subcontractor from contract-supported activities and may include.
- i. Voluntary contributions received from a participant or responsible party as a result of the service(s).
  - ii. Income from usage or rental fees of real or personal property acquired with funds provided under this Contract.
  - iii. Royalties received on patents and copyrights from contract-supported activities.
  - iv. Proceeds from the sale of items fabricated under a contract agreement.
- B. Subrecipient shall provide every participant the opportunity to voluntarily contribute toward the cost of the services provided under this Contract for the applicable programs. Subrecipient shall protect the privacy of each such contributor with respect to his or her contribution and shall not maintain individual records of contributions. No participant shall be denied a service because of unwillingness or inability to contribute towards the cost of said service.
- C. Subrecipient shall keep separate accounts of all contributions for services provided pursuant to this Contract. Subrecipient shall report on such contributions monthly to County in the format required by County.
- D. Contributions for services provided pursuant to this Contract shall be added to the funds provided to Subrecipient by County pursuant to this Contract and shall be used for the purposes and in accordance with the terms of this Contract.
- E. Program Income must be reported and expended under the same terms and conditions as the program funds from which it is generated.

- F. Program Income must be used to pay for current allowable costs of the program in the same fiscal year that the income was earned.
- G. For Title III B, III-C, III-D, III E, VII Ombudsman, and VII-A Elder Abuse Prevention programs, Program Income must be spent before contract funds and may reduce the total amount of contract funds payable to the Subrecipient.
- H. Program Income may not be used to meet the matching requirements of this Contract.
- I. Program Income must be used to expand baseline services.
- J. No fees may be charged for services although voluntary contributions may be requested.

### **VIII. Allocation Transfers**

- A. Subrecipient shall submit a request to OoA to transfer federal or State funds between Title III B, C1, and C2 programs in accordance with the most current funding allocation.
  - i. Transfer of federal baseline funds is allowable between Titles III B and III-C in accordance with OAA § 308(b)(5)(A) and between Titles III C1, and III C2 in accordance with OAA § 308(b)(4)(A).
  - ii. Transfer of State funds is allowable between Title III C1 General Fund and Title III C2 General Fund.
  - iii. The Title III-C nutrition augmentation funding may be transferred between Title III General Fund C1 and Title III General Fund C2 as needed to provide services. The funding must not be transferred to other programs or be used to supplant other program funding, including the Federal Title III C1 and Federal Title III C2.
- B. Allocation transfers are due to OoA as determined by County/State.
- C. Approved transfers will be incorporated within the Subrecipient's Detail Budget.

**ATTACHMENT D-4**  
**STAFFING PLAN**

Meals on Wheels Orange County  
July 1, 2026 – June 30, 2027

The following Staffing Plan is set forth for informational purposes only, and may be adjusted by mutual agreement, in writing, of Subrecipient and County.

**I. Adult Day Care**

<b>Title</b>
Accounts Payable Clerk/Accounting Clerk
Accounts Receivable Lead/Supervisor
Accounts Receivable Specialist
Administrative Assistant II – Outreach
Chief Development Officer
Chief Executive Officer
Chief Financial and Administrative Officer
Controller
Data Entry Clerk
Database Manager
Development Associate
Director of Marketing and Events
Executive Assistant
Financial Analyst
Human Resources Generalist
Program Aide
Program Manager – ADC
Sr. Director of Development
Sr. Director of Human Resources
VP of Home and Care Services

**II. Case Management**

<b>Title</b>
Accounts Payable Clerk/Accounting Clerk
Accounts Receivable Lead/Supervisor
Accounts Receivable Specialist
Administrative Assistant II – Outreach
Administrative Coordinator
Case Management Special Projects
Case Manager Assistant/Associated Case Manager
Case Managers
Chief Development Officer
Chief Executive Officer
Chief Financial and Administrative Officer
Controller
Data Administrator
Data Entry Clerk
Database Manager
Development Associate
Director of Marketing and Events

Director Social Services
Director Volunteer Services
Executive Assistant
Financial Analyst
Human Resources Generalist
Manager of Case Management, Social Services
Senior Director of Development
Social Services Project Manager
Sr. Director of Human Resources
Vice President of Social Services
Volunteer Services Coordinator
Volunteer Services Manager

**III. In-Home Services**

Title
Accounts Payable Clerk/Accounting Clerk
Accounts Receivable Lead/Supervisor
Accounts Receivable Specialist
Administrative Assistant II – Outreach
Administrative Coordinator
Case Management Special Projects
Case Manager Assistant/Associated Case Manager
Case Managers
Chief Executive Officer
Chief Financial and Administrative Officer
Controller
Data Administrator
Data Entry Clerk
Database Manager
Development Associate
Director of Marketing and Events
Director Social Services
Director Volunteer Services
Executive Assistant
Financial Analyst
Human Resources Generalist
Manager of Case Management, Social Services
Senior Director of Development
Social Services Project Manager
Sr. Director of Human Resources
Vice President of Social Services
Volunteer Services Coordinator
Volunteer Services Manager

**IV. Transportation**

Title
Accounts Payable Clerk
Accounts Receivable Lead

Accounts Receivable Specialist
Administrative Assistant II – Outreach
Administrative Coordinator
Chief Executive Officer
Chief Financial and Administrative Officer
Controller
Data Administrator
Data Entry Clerk
Director Social Services
Director Volunteer Services
Executive Assistant
Financial Analyst
Human Resources Generalist
Social Services Project Manager
Sr. Director of Human Resources
Vice President of Social Services
Volunteer Services Coordinator
Volunteer Services Manager

The substitution or addition of other key individuals in any given category or classification shall be allowed only with prior written pre-approval of the County.

The County may reserve the right to involve other personnel, as their services are required. The specific individuals will be assigned based on the need and time of the service/class required. Assignment of additional key personnel shall be subject to County approval pursuant to Paragraph 13 of the Contract.

**ATTACHMENT E-4  
PERFORMANCE STANDARDS  
AREA PLAN SERVICE UNITS**

<b>AGENCY NAME:</b> Meals on Wheels Orange County				<b>FISCAL YEAR:</b> 2026-2027	
<b>PROGRAM NAME(S):</b> Adult Day Care				<b>SERVICE AREA:</b> • Countywide	
<b>CONTRACT #:</b> MA-012-24011309				<b>DATE:</b> July 2026	
<b>PROGRAM SERVICE</b>	<b>NUMBER OF ANNUAL SERVICE UNITS</b>		<b>UNDUPLICATED PERSONS SERVED</b>	<b>SERVICE CATEGORY</b>	<b>DESCRIPTION OF SERVICE UNITS</b>
Adult Day Care	16,034	# of Day Care Hours	30	Registered	<b>Adult Day Care (1 Hour):</b> Services or activities provided to adults who require care and supervision in a protective setting for a portion of a 24-hour day. Includes out of home supervision, health care, recreation, and/or independent living skills training offered in centers most commonly known as Adult Day, Adult Day Health, Senior Center, and Disability Day Programs.

**ATTACHMENT E-4  
PERFORMANCE STANDARDS  
AREA PLAN SERVICE UNITS**

<b>AGENCY NAME:</b> Meals on Wheels Orange County				<b>FISCAL YEAR:</b> 2026-2027	
<b>PROGRAM NAME(S):</b> Case Management				<b>SERVICE AREA:</b> • Countywide	
<b>CONTRACT #:</b> MA-012-24011309				<b>DATE:</b> July 2026	
<b>PROGRAM SERVICE</b>	<b>NUMBER OF ANNUAL SERVICE UNITS</b>		<b>UNDUPLICATED PERSONS SERVED</b>	<b>SERVICE CATEGORY</b>	<b>DESCRIPTION OF SERVICE UNITS</b>
Case Management	9,302	# of Case Management Hours	699	Registered	<b>Case Management (1 Hour):</b> Assistance in the form of access coordination in circumstances where the older person is experiencing diminished functioning capacities, personal conditions or other characteristics, which require the provision of services by formal service providers or family caregivers. Activities of case management include such practices as assessing needs, developing care plans, authorizing, and coordinating services among providers, and providing follow-up reassessment, as required.

**ATTACHMENT E-4  
PERFORMANCE STANDARDS  
AREA PLAN SERVICE UNITS**

<b>AGENCY NAME:</b> Meals on Wheels Orange County				<b>FISCAL YEAR:</b> 2026-2027	
<b>PROGRAM NAME(S):</b> In-Home Services				<b>SERVICE AREA:</b> • Countywide	
<b>CONTRACT #:</b> MA-012-24011309				<b>DATE:</b> July 2026	
<b>PROGRAM SERVICE</b>	<b>NUMBER OF ANNUAL SERVICE UNITS</b>		<b>UNDUPLICATED PERSONS SERVED</b>	<b>SERVICE CATEGORY</b>	<b>DESCRIPTION OF SERVICE UNITS</b>
In-Home Services	2,543	# of Personal Care Hours	37	Registered	<b>Personal Care (1 Hour):</b> Assistance (personal assistance, stand-by assistance, supervision or cues) with Activities of Daily Living (ADLs) and/or health-related tasks provided in a person's home and other community settings. Personal care may include assistance with Instrumental Activities of Daily Living (IADLs).
	4,631	# of Homemaker Hours	74		<b>Homemaker (1 Hour):</b> Performance of light housekeeping tasks provided in a person's home and other community settings. Task may include preparing meals, shopping for personal items, managing money, or using the telephone in addition to light housework.
	384	# of Chore Hours	5		<b>Chore (1 Hour):</b> Performance of heavy household tasks provided in a person's home and other community settings. Tasks may include yard work or sidewalk maintenance in addition to heavy housework.
	7,558	Total In-Home Services Hours			

**ATTACHMENT E-4  
PERFORMANCE STANDARDS  
AREA PLAN SERVICE UNITS**

<b>AGENCY NAME:</b> Meals on Wheels Orange County			<b>FISCAL YEAR:</b> 2026-2027		
<b>PROGRAM NAME(S):</b> Transportation			<b>SERVICE AREAS:</b> <ul style="list-style-type: none"> <li>• Service Area 1 – North</li> <li>• Service Area 2 – West</li> <li>• Service Area 3 – Central</li> <li>• Service Area 4 – Beach Cities</li> </ul>		
<b>CONTRACT #:</b> MA-012-24011309			<b>DATE:</b> July 2026		
PROGRAM SERVICE	NUMBER OF ANNUAL SERVICE UNITS		UNDUPLICATED PERSONS SERVED	SERVICE CATEGORY	DESCRIPTION OF SERVICE UNITS
Transportation	17,431	# of One-Way Trips	315	Non-Registered	<b>Transportation (1 One Way Trip):</b> Transportation from one location to another. Does not include any other activity. May include travel vouchers and transit passes.

**ATTACHMENT F-4**  
**FEDERAL AWARD IDENTIFICATION**

**1. Federal Award Identification**

- A. **Subrecipient Name:** Community SeniorServ, Inc. dba Meals on Wheels Orange County
- B. **Subrecipient’s Dun & Bradstreet Number (DUNS):** 084975739
- C. **Subrecipient’s SAM Unique Entity Identifier (UEI):** SB9RTCT6FJA5
- D. **Federal Award Identification Number (FAIN):** TBD
- E. **Federal Award Date:** 2026-2027
- F. **Subaward Period of Performance:** July 1, 2026 to June 30, 2027
- G. **Total Amount of Federal Funds Obligated by the Action:** \$1,251,317

CFDA	FAIN	Award Date	Formula Funds	Amount
93.044	TBD	2026	Title III-B	\$625,658
93.044	TBD	2027	Title III-B	\$625,659
			<b>TOTAL:</b>	\$1,251,317

- H. **Total Amount of Federal Funds Obligated to the Subrecipient:** \$1,251,317
- I. **Total Amount of the Federal Award:** TBD
- J. **Federal Award Project Description:** Special Programs for the Aging, Title III, Part B, Grants for Supportive Services and Senior Centers
- K. **Federal Awarding Agency:** U.S. Department of Health and Human Services, Administration for Community Living
- L. **Name of Pass-Through Entity (PTE):** California Department of Aging and County of Orange Office on Aging
- M. **Contact Information for the Awarding Official:** Claudia Harris, Director (714) 480-6465, [claudia.harris@occr.ocgov.com](mailto:claudia.harris@occr.ocgov.com)
- N. **CFDA Number and Name:** #93.044 Special Programs for the Aging, Title III, Part B, Grants for Supportive Services and Senior Centers
- O. **Whether Award is R&D:** No
- P. **Indirect Cost Rate for the Federal Award:** 15%