

RUDOLF STEINER COLLEGE

Hawai'i Island Charter Schools Foodservice Hui

A Thesis

By

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The undersigned have examined the thesis entitled ‘Hawai‘i Island Charter Schools Foodservice Hui’ presented by **CHRIS HECHT**, a candidate for the degree of **Master of Arts in the Department of Education** and hereby certify that it is worthy of acceptance.

Date

Advisors name

ABSTRACT

This project addresses the issue of food insecurity among low-income charter school students on Hawai‘i Island. A troubling number of children on our island are at risk for hunger, suffer from obesity and related disease, and face learning challenges – much of which could be alleviated by healthy school meals.

Hawaii’s charter schools historically have served the lowest-income communities in the state, but most charter schools have had difficulties implementing federal nutrition programs, due to unsustainable costs and complexity of operations.

We propose to form a regional cooperative (“hui”, a Hawaiian word) that will provide member schools with centralized nutrition program services including administration, training, compliance, reporting, and procurement. The hui will enable charter schools to increase their participation in federal nutrition programs by reducing the administrative burden and operating costs.

The first project goal is to meet the food needs of low-income charter school students by increasing their participation in federal child nutrition programs. The second goal is to improve food security and community self-reliance by increasing procurement of local agricultural products.

The activities to achieve our goals include 1) Data collection and community outreach; 2) Hui start-up activities; 3) Creating new linkages with local food producers; 4) Hui operations, expansion and replication.

The project will benefit low-income students attending nine charter schools on Hawai‘i Island with aggregate enrollment of 3,447 students. The local agricultural community will also benefit from the steady, reliable market for their local products. Replication of the hui nationwide could also benefit schools facing similar challenges.

NOTE TO THE READER

This thesis project was originally developed as a proposal to the U.S. Department of Agriculture's National Institute of Food and Agriculture, and was submitted for review on 29 November 2015 on behalf of Kona Pacific Public Charter School.

The proposal includes an evaluation component to be carried out by an independent project evaluator, the Nutrition Policy Institute at the Center for Weight and Health at the University of California at Berkeley. The Nutrition Policy Institute was a collaborator on the development of the section on project evaluation (page 18) and the evaluation plan (page 25), as well as the description of the organization (page 8). Much of the ideas and language in those sections was developed collaboratively, though I am solely responsible for the final edit. The remainder is my original work.

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Supporting Documents

- Logic Model
- Business Plan
- Project Budget

The Community to Be Involved in the Project and the Needs to Be Addressed

Each day, as many as 53,000 low-income public school students in Hawai‘i do not eat a school lunch, and 95,000ⁱ do not eat a school breakfast. Many of these students suffer from food insecurity,ⁱⁱ obesity and related disease,ⁱⁱⁱ and face learning challenges – much of which could be avoided or alleviated by healthy school meals.^{iv,v,vi} A disproportionate number of these students attend Hawaii’s public charter schools, which historically have served the lowest-income communities in the state.

The proposed project will address food insecurity and poor nutrition among low-income charter school students attending nine schools on Hawai‘i Island. The project approach is the development of a broad-based strategic community partnership that will focus on the food and nutrition needs of the most vulnerable high-risk group in our community – the children. This partnership will take the form of a cooperative, whose members are Hawai‘i Island charter schools that share a commitment to providing comprehensive nutrition programs to their students, and the cooperative structure will enable them to achieve that goal through shared, centralized services.

Each school is a School Food Authority (SFA), and together the schools have aggregate enrollment of 3,447 students. Five of the schools participate in federal school nutrition programs; 75% of their students are eligible for free or reduced-price meals.

Hawai‘i Island is made up of sparsely populated agricultural communities. With a population of 190,000 spread over 4,000 square miles,^{vii} the census classifies the entire island as rural, except for the city of Hilo. Our small rural communities face significant socioeconomic challenges. Hawai‘i Island has the lowest per capita income in the state, and the highest rate of people whose income in the past 12 months is below the poverty level;^{viii} 5.3% unemployment is the worst in the state and 23% of island residents participate in SNAP.^{vii}

Diet-related health problems are a significant issue. On Hawai‘i Island, diet-related chronic diseases – including diabetes, cardiovascular disease and cancer – disproportionately affect Native Hawaiian, immigrant, and low-income communities.^{viii} One in three children entering kindergarten in Hawai‘i is overweight or obese.^{ix} The state’s highest obesity rate of 70% occurs on Hawai‘i Island, among Native Hawaiians and those with income less than 63% of the poverty level.^x

Limited participation by low-income public school students, including charter school students, in federal school nutrition programs contributes to these problems. Hawai‘i charter schools are not required to provide nutrition programs; roughly half of them do so. Hawaii’s public charter school leaders philosophically support federal school nutrition programs, but cite unsustainable costs and complexity of operation as the reasons why their schools don’t offer a nutrition program. Charter schools that offer nutrition programs must subsidize the programs out of their operating budget, diverting resources from their core educational mission.

The applicant and partners propose to form a regional cooperative (“hui,” a Hawaiian word) that will provide member schools with centralized nutrition program services including administration, training, compliance, reporting, and procurement. The first goal of this project is to meet the food needs of Hawaii Island low-income charter school students by increasing the schools’ and students’ participation in federal school nutrition programs, which will improve the nutrition,^{xi,xii,xiii,xiv,xv} and therefore the healthⁱⁱⁱ of low-income students and their communities. The second goal is to improve food security and community self-reliance by increasing procurement of local agricultural products. The proposed hui will serve Hawai‘i Island, then be replicated on Kauai and Oahu, the other islands with multiple charter schools.

It is extremely expensive to operate nutrition programs in Hawai‘i. The Hawai‘i cost of the USDA Thrifty Food Plan is 147% of average mainland cost, and labor cost is 118%.^{xvi} Schools in Hawai‘i

typically lose \$1.42 for each lunch served.^{xvii} Small schools such as charter schools, lacking economies of scale, incur even greater financial loss. In addition, it is challenging for small schools to develop the expertise to operate a successful nutrition program along with the core mission of education. The complex administrative and compliance requirements of federal nutrition programs do not acknowledge the difference between an SFA that serves 100 meals per day and one that serves 100,000. The operation of nutrition programs requires an estimated 15% of administrative staff time at Hawai'i charter schools that participate in the National School Lunch Program (NSLP).

As the most geographically isolated place on earth,^{xviii} Hawai'i has a particularly urgent need to increase the local production of agricultural products. Our state imports more than 85% of its food^{xix} and more than 90% of its energy supply.^{xx} Increasing regional food security and self-reliance is a necessity.

The proposed hui will follow the sponsorship model operated successfully for years in the Child and Adult Care Food Program and the Summer Food Service Program. While member schools will maintain their independence as SFAs, performing some program activities on site such as meal counting, centralizing nutrition program services including administration, training, compliance, reporting, and procurement will reduce the requirement for specialized expertise in each school. The hui will also reduce the operational and administrative costs associated with federal nutrition programs. These challenges are so substantial that four of the schools that have joined in this proposal don't currently participate in federal nutrition programs. With the support of the hui, these schools will feed their students. Other member schools will expand their programs, adding additional meal service. By leading the hui and providing services to other schools, Kona Pacific aims to reduce the barriers to charter school participation in federal nutrition programs, using our

real-world experience in successful program operation to guide the development of services that support effective, efficient, low cost program operation.

Our communities contain an array of robust capacities and assets in place that can be mobilized to address the challenges articulated above. This project will serve to organize those capabilities and assets into an effective, efficient cooperative school nutrition support program – Hawaii Island’s first comprehensive response to the linked issues of school nutrition, local food access and strengthening our local agricultural economy.

Founding member schools are a major asset in that five of the nine schools are already – successfully but with inordinate cost – operating nutrition programs, and the other four have previously operated them. A crucial community partner for the hui will be Hawai‘i Island’s local food hub, Adaptations, which distributes produce from more than 150 Hawai‘i Island farms. The vitality and success of Adaptations is made possible by the vibrant local farming community, a major asset of our rural area. The growth and sustainability of our local agricultural economy is supported by the Kona Farmers Union as well as programs such as Friends of Kona Pacific Public Charter School’s AmeriCorps Program, FarmCorps Hawai‘i, which places 15 volunteer members at other school and community farms to assist with agricultural development. In April 2015, the state legislature awarded Kona Pacific a \$1.2M grant to build a community kitchen. The new kitchen will allow us to expand our community feeding programs, while also housing the first value-added production facility in West Hawai‘i. The value-added program will directly support local farms and agricultural entrepreneurs, while increasing our community’s food security and self-reliance, and strengthening the agricultural economy. In addition, with the support of USDA Farm to School planning funds, we are expanding production on our 20-acre farm, to supply our foodservice and low income residents. We will leverage these assets to develop supporting

capacities within the communities served by this project. Expanded and healthier school meal programs will benefit these groups, and the reciprocal is equally true.

64% of island charter schools have joined this project, strongly indicating that we have accurately identified a need and proposed an appropriate response. Recent conversation with researchers from the Nutrition Policy Institute of the University of California reveals that the same set of issues we have identified appear to be challenges for many small schools nationwide. We plan to develop – and document – a solution that can be adopted by any group of small schools. Therefore, the proposed project has been developed with replication in mind, and designed to support robust evaluation.

The hui (cooperative) model was selected as the most appropriate and meaningful avenue to address the stated challenges. Hui is a Hawaiian term for a cooperative group working together for a shared purpose.

Cooperative efforts build community bonds and capacity, and in today’s challenging economic climate, cooperatives can provide an effective alternative to traditional business partnerships. Cooperatives can be powerful forces for change, can strengthen a local economy, and circulate the benefits back to the members – and these benefits ripple out to the broader community.

The Organizations and Communities Involved in the Project.

Applicant

The Kona Pacific Public Charter School campus is located on a 40-acre agricultural learning center that also houses a 20-acre farm. As an anchor resource in our underserved impoverished community, we serve a diverse set of needs that go far beyond our core mission of K-8 education. We provide full-day programs, nutrition education and a health fair, family literacy and parenting workshops, and our W.H.O.L.E foodservice feeds the most impoverished and vulnerable members of our community, as hunger is an issue throughout our region.

Through a diverse set of programs and community partnerships, Kona Pacific feeds hundreds of area residents. Working with organizations such as Head Start, Meals on Wheels, Parks & Recreation, Family Support West Hawai'i, as well as through school programs, we provide healthy, delicious breakfasts, morning snacks, lunches, and afternoon snacks to low-income community members from 3 to 93 years old. We developed the first mobile Summer Food Service Program in the state, serving six sites throughout our community. More than 4,300 meals were served to children who otherwise would have gone hungry, as there is no other summer open feeding program within two hours drive. Kona Pacific students now make up less than a third of those we feed.

We are the only school in Hawai'i that operates a community food program. Kona Pacific has been recognized by the county, state and federal governments for its valuable contributions to improving food security. In May 2014, we were awarded the Hawai'i Public Charter Schools Network's "New Best Practices" award for our foodservice and nutrition advocacy work. In August 2014, we received a Certificate of Special Recognition from the governor's office for implementing Hawaii's first Universal Breakfast in the Classroom program. As mentioned above, in April 2015, the state legislature awarded Kona Pacific a \$1.2M grant to build a community kitchen. This

November, we were honored twice by USDA. We received the 2015 Western Region Summer Sunshine Award for Program Expansion in Local Communities for our mobile SFSP outreach program, and we were awarded a Farm to School planning grant for developing an action plan that incorporates our on-site farm, regional food system segments, and student educational activities.

The applicant harnesses the synergy of this extensive array of activities in order to benefit the low income community and local agricultural producers. Kona Pacific's network of educational, foodservice, and agricultural relationships creates a virtuous cycle, with each component reinforcing and amplifying the benefit of the others. We link the Office of Hawai'i Child Nutrition Programs, our SFA, our farm and school gardens, other farmers and agricultural producers, for-profit food distributors, a community food hub, and the food bank with: our students, their families, and the hundreds of other low income residents that we feed in collaboration with partner agencies and organizations.

Key Organizations

Member Schools

The nine founding member schools of the hui are all community-based organizations. As independent charter schools, each was founded by community members to have a unique mission formulated to meet their low-income community's specific needs. All of the schools maintain a lively ongoing dialog with their community, in order to identify needs, develop programs in response, and refine them so that they are successful. The member schools have all operated nutrition programs, though some currently do not. Each school brings a history of community engagement around food security as well as experience in feeding low-income children.

Project Partners

Project partner organizations possess a diverse array of expertise that directly supports the project's goals and outcomes. The organizations link food system producers and providers with the low-income population. The Kohala Center (TKC) is an independent, community-based center for research, conservation, and education that engages in basic and applied research, conservation and restoration initiatives, and public outreach and education – all carried out through local, regional, national, and international partnerships. TKC has 14 years of experience in creating and implementing educational and service programs in rural Hawai'i, developing and managing community coalitions, and leading policy research initiatives.

The mission of the HDOE Hawai'i Child Nutrition Programs office is to promote the importance of nutrition through federal compliance, education and partnerships, and their vision is that all participants in the Hawai'i child nutrition programs will be healthy and hunger-free. They have developed an extensive statewide network focusing on program expansion, nutrition education and low-income community partnerships.

Adaptations Community Food Hub has been providing exclusively locally grown produce to chefs and families since 1984. They act as a distribution center for vegetables, fruits and herbs grown by more than 150 farms on Hawaii Island. They operate a Community Supported Agriculture program that makes nutritious, locally grown produce affordable for low-income community members.

Independent Evaluator

The Nutrition Policy Institute (NPI) at the University of California conducts research and evaluation to inform and strengthen nutrition policy for low-income communities. The Institute focuses on the federal food programs, given their scope and reach, and further priority is accorded to healthy nutrition for children in their earliest years, when interventions to prevent food

insecurity and obesity are most effective. For more information on NPI, please see the Collaborative Arrangements attachment.

Recipe/Menu Consultant

The Recipe/Menu Consultant, Carleton Gillenwater, was a key member of the team that developed the Kona Pacific's WHOLE Food Service Program, and has 24 years of experience in hotel and institutional food service development – most recently with Crestwood Behavioral Health, where he established a sustainable high quality whole food program for people with severe mental illness. He will assist the project team in the areas of recipe and menu development.

Project Goals and Intended Outcomes

Goal #1: Meet the food needs of low-income charter schools students by increasing their participation in federal school nutrition programs.

The formation of the charter schools foodservice hui will reduce the administrative burden of operating federal nutrition programs, and build member schools' capacity to administer and implement the programs, leading to the following outcomes:

Intended Outcome 1: Increased participation by public charter schools in federal school nutrition programs. Currently five out of the nine member schools are operating federal nutrition program. By July 2019, all member schools will be participating in the NSLP, the Fresh Fruit and Vegetable Program (FFVP), and all schools will offer at least one additional federal nutrition program (breakfast, afterschool snack, supper, summer meals). The students served by member schools will benefit from this outcome, as they will have increased access to federal nutrition programs in their schools.

Intended Outcome 2: Increased participation by low-income charter school students in federal nutrition programs. Participating schools together serve 3,447 students. Currently 1,902 or 55% of those students do not have access to federal nutrition programs in their schools. By July 2019, student participation in federal nutrition programs in member schools will increase by 40% compared to baseline. The students and the communities served by member schools will benefit from this outcome, as participation in the programs will improve their nutrition,^{xi,xii,xiii,xiv,xv} their health,ⁱⁱⁱ and their academic performance.^{ii,vi}

Intended Outcome 3: Increase use of shared menus by member schools. By July 2019, at least 75% of member schools will adopt shared menus. Use of shared menus that comply with Healthy Hunger-Free Kids Act mandates will relieve schools of an onerous task, decrease food costs

through joint procurement, and increase procurement of local agricultural products.

Intended Outcome 4: Increase use of joint procurement by member schools. By July 2019, member schools will be jointly procuring at least 30% of their federal nutrition program inputs.

Joint procurement will relieve schools of an onerous administrative task, decrease food costs, and increase procurement of local agricultural products.

Intended Outcome 5: Decrease school foodservice administrative and procurement costs. By July 2019, member schools will be saving at least 30% on combined administrative and procurement costs for their federal nutrition programs per school year, compared to baseline. The savings will encourage schools to further expand their nutrition programs.

Goal #2: Improve food security and community self-reliance by increasing procurement of local agricultural products.

The charter schools foodservice hui will focus menu planning and joint procurement toward serving and purchasing local food, which will lead to an increase in the amount of local agricultural products procured by member schools as measured by the percentage of their spending on food for federal nutrition programs.

Intended Outcome 1: Increased procurement by public charter schools of local agricultural products. By July, 2019, member schools will be procuring at least 40% locally sourced food.

Through its focus on procurement of local agricultural products, the hui will strengthen the local food system by helping schools, local food producers, and distributors to develop a local school food supply chain. Kona Pacific's recent award of a USDA Farm to School planning grant will fund development of an action plan for increasing local procurement and strengthening the food system, supporting achievement of the project's intended outcomes. Charter school federal nutrition programs will provide a steady demand for locally sourced food, and project partner The

Kohala Center will provide comprehensive services strengthening the local food system to meet this increased demand. The hui will closely coordinate its local procurement initiative with The Kohala Center's food system activities.

Hawai'i Island's predominantly agricultural community will benefit from an increased and stabilized demand for the local agricultural production that is its livelihood. The 3,447 students served by member schools will benefit from increased access to nutritious local food.

Project Deliverable: Development of a replication toolkit. By July, 2019 a replication toolkit including a development process manual, best practices manuals, accounting procedures manual, document templates, and training materials will be developed. The initial hui will serve Hawai'i Island, then be replicated on Kauai and Oahu, the other islands with multiple charter schools. The students of the Kauai and Oahu charter schools will benefit from this deliverable, as it will increase their participation in federal nutrition programs.

Activities to Achieve the Goals

The applicant and its partners have two project goals: to meet the food needs of low-income charter schools students by increasing their participation in federal school nutrition programs, and to improve Hawaii's food security and community self-reliance by increasing procurement of local agricultural products. These goals and the outcomes described above will be accomplished through the formation of a charter schools foodservice hui that that will provide member schools with centralized nutrition program services.

The charter schools foodservice hui will make it much easier for charter schools to increase their participation in federal nutrition programs, by reducing the administrative burden and cost of operating the programs. The hui will relieve administrative burden through centralizing activities that are common to all schools such as meal claiming, compliance, reporting, policy and best practices development, creating templates for commonly used documents, providing school-site training in nutrition program operation, and developing shared menus for breakfast and lunch.

The hui's centralized services will reduce the administrative expense of operating federal nutrition programs by allowing schools to effectively share staff, leveraging fixed costs. Productivity will be higher for expert hui staff members that concentrate their work on this one domain, yielding further savings compared to school-site staff that have to attend to a wide range of tasks daily. In addition, the hui will reduce food cost through joint procurement; this savings will increase along with the expansion in student participation. These benefits will diminish the challenges to increasing charter school participation in federal nutrition programs, leading to an increase in their students' participation in the programs.

In order to increase procurement of local agricultural products, menu planning and joint procurement will be focused on locally sourced food. The process will begin by gathering data

from member schools regarding their current local procurement and by surveying local producers and distributors to determine which agricultural products are most likely to be local, affordable, and available. This data will inform the development of shared menus containing ingredients that can be procured locally. Menus will be regularly reviewed and enhanced in order to increase local procurement. Likewise, the initial data gathered from schools and local producers will inform the creation of a procurement plan focusing on sourcing locally. In June of each project year, the procurement plan will be revisited and improved in order to increase local procurement.

Please see the detailed Work Plan below, which begins on page 21.

Relationship to Program Objectives

The proposed project directly addresses all of the primary goals of the CFPCGP.

CFPCGP Goal 1: Meet the food needs of low-income individuals through food distribution, community outreach to assist in participation in federally assisted nutrition programs, or improving access to food as part of a comprehensive service.

The Hawai'i Charter Schools Foodservice Hui meets the food needs of low-income individuals by increasing participation by charter schools in federal school nutrition programs and thereby increasing low-income families' access to and participation in federal nutrition programs. Most of the students live in families at risk of food insecurity and receive a majority of their daily nutrition at school.

CFPCGP Goal 2: Increase the self-reliance of communities in providing for the food needs of the communities.

The proposed project will increase our communities' self-reliance in providing for its food needs by building the capacity of charter schools to feed their students and by strengthening the local food system. The hui will build the capacity of charter schools to feed their students by relieving administrative burden, reducing costs, and providing training. The schools' federal nutrition programs will be more effectively administered, more comprehensive, and more sustainable. Through its focus on local procurement and its partnership with The Kohala Center, the hui will strengthen the local food system by helping schools, local food producers and entrepreneurs, and distributors develop a local school-food supply chain.

CFPCGP Goal 3: Promote comprehensive responses to local food access, farm, and nutrition issues.

The proposed project promotes a comprehensive response to students' lack of access to nutritious daily meals. Because the majority of charter school students live in families at risk of food

insecurity and receive a majority of their daily nutrition from school meals, schools can be a source for immediately and comprehensively meeting daily nutrition needs.

Likewise, the farm community will benefit from the comprehensive approach to building a local school food supply chain. The hui will provide a steady, reliable market for local products, will connect farmers with purchasers, and The Kohala Center's work will continue to support farmers' capacity to meet this increased demand.

CFPCGP Goal 4: Meet specific state, local or neighborhood food and agricultural needs including needs relating to: a) equipment necessary for the efficient operation of a project; b) planning for long-term solutions; or c) the creation of innovative marketing activities that mutually benefit agricultural producers and low-income consumers.

The proposed project meets state and local food and agricultural needs relating to planning for long-term solutions by building a sustainable model that will enable charter schools to meet their students' food needs. Once the hui is established, member schools will have the capacity to provide comprehensive, sustainable federal nutrition programs into the future. The hui can then be replicated throughout the islands, enabling charter schools throughout the state to meet their communities' food needs. Likewise the strengthening of the local school food supply chain and local food system will lead to long-term food security and self-reliance.

The proposed project also meets state and local food and agricultural needs relating to the creation of innovative marketing activities that mutually benefit agricultural producers and low-income consumers. Applicant and project partner The Kohala Center will link local farmers, producers, food distributors, and food hubs together with charter schools to meet the food needs of low-income students. Rather than having nine separate customers to deal with, farmers and other vendors will be able to work with a single entity, the hui, substantially reducing the overhead for

each product sold. In addition, the hui will develop and promote a forward contracting system, wherein farmers will receive advance payment for their crops before they are planted, reducing the capitalization burden and risk associated with increasing production. Finally, the hui will develop and promote a market for off-grade produce, which does not currently exist in Hawaii's luxury and fine dining focused food system.

The agricultural community will benefit from the steady, reliable market for their local products, and charter school students will benefit from increased access to nutritious daily meals. This coordinated focus on local, joint procurement can be replicated as hui are formed in other communities, leading to a statewide increase in the self-reliance of communities in providing for their food needs.

Evaluation

To ensure objectivity, the evaluation will be conducted by an independent researcher, which will either be the Nutrition Policy Institute (NPI) in the University of California's Division of Agriculture and Natural Resources, or an evaluation team in Hawai'i that NPI will identify. NPI is a nutrition research organization that has extensive expertise in both process and outcome evaluation of child nutrition interventions. NPI researchers have been engaged in conducting evaluations in communities and schools for nearly two decades, establishing a national reputation for providing the evidence needed to build and inform local, state-wide and national nutrition-related policy. The evaluation is a critical piece of this proposed project as it will help to establish how a hui model can be implemented to overcome the challenges small schools face in participating in federal school nutrition programs. Prior to data collection all evaluation protocols and instruments will be submitted for review and approval by an Institutional Review Board; it is anticipated that the evaluation will be exempt as no personal data will be collected from human subjects.

The evaluation will consist of both process and outcome evaluations. The process evaluation will involve collecting data on project development and implementation over time. Stakeholder interviews will be conducted using a structured interview guide at 4 time-points: baseline (Nov-Dec 2016), year 1 (Apr-May 2017), year 2 (Apr-May 2018) and year 3 (Apr-May 2019). Stakeholders will consist of hui staff, foodservice administrators and school directors at the nine schools, and local food procurement sources such as farmers, of ~30 stakeholders. Information from the interviews will be entered into a data management system and common themes will be identified. The data will be used to track challenges, solutions, successes, best practices and lessons learned. The process evaluation will be used to describe a model and create the resources and

materials that can be utilized to efficiently replicate the hui on Kauai and Oahu (see the Project Deliverable, above).

The outcome evaluation will focus on analyzing school and hui foodservice financial and food procurement data, data on student participation in the federal school nutrition programs, as well as school menus to assess how well the hui has met its goals and objectives. The Evaluation Plan below on page 25 summarizes the outcome data to be collected. All data will be entered into a data management system and descriptive statistics and their changes over time will be computed. A comprehensive written report will describe the results from the outcome evaluation, exemplary practices found, the implications of the findings, and recommendations for future policy.

Self-Sustainability

This project will be self-sustaining long-term, as the only need for grant funding is for development and startup. After the three-year project period, the hui will be funded by member schools, and break even each year. All of the hui's activities will continue beyond the project period, except for startup activities.

Budget projections are conservative, and we expect that participation, and member schools funding, will be greater than forecasted. The Project Director, who will serve as the project's financial officer, has extensive experience in the fiscal management of small schools, grant funded projects, and multi-million dollar government projects, as well as proven access to the network of governmental and private philanthropic grant programs that provide financial support.

Research for budget projection was conducted by directly contacting vendors, member schools, consultants, service providers, and professionals. All income shown on the budget is documented with a firm commitment from each source. No grant funding is projected past year three, though we are aware of federal and philanthropic funding relevant to the project.

Project Work Plan

The activities that will lead to the accomplishment of Intended Outcomes 1, 3, 4 and 5 are closely interrelated. Likewise the activities relating to Intended Outcomes 1, 3, 4 and 5 will lead to successfully reaching Intended Outcome 2.

Pre-planning activities for this project began 18 months prior to the development of this proposal, led by the applicant and project partner The Kohala Center. Therefore, applicant anticipates that it will be prepared to begin hui services within approximately one month of project funding.

Goal 1		
Meet the food needs of low-income charter schools students by increasing their participation in federal school nutrition programs.		
<p>Intended Outcome 1: Increased participation by public charter schools in federal school nutrition programs: By July, 2019, all member schools will be participating in the NSLP, the FFVP, and all schools will offer at least one additional federal nutrition program (breakfast, afterschool snack, supper, summer meals).</p> <p>Intended Outcome 3: Increase use of common menus by hui schools: By July, 2019, at least 75% of member schools will adopt the common menus.</p> <p>Intended Outcome 4: Increase use of joint procurement by hui schools: By July, 2019, member schools will be jointly procuring at least 30% of their federal nutrition program inputs.</p> <p>Intended Outcome 5: Decrease school foodservice administrative and procurement costs: By July, 2019, member schools will be saving at least 30% on combined administrative and procurement costs for their federal nutrition programs per school year.</p>		
Activity	Completion Date	Participants/Staff Responsible, Number of Participants/Staff
Complete initial start-up activities and launch Hawai'i Island hui, including the following activities: <ul style="list-style-type: none"> - facilitate final start-up meetings - finalize mission, vision, values, goals & structure - complete hui agreements and contracts - hire staff 	Nov 1, 2016	The Kohala Center; Project Director; member schools ~40 pax
Assess current status of all member schools in terms of: federal nutrition programs currently offered, opportunities and obstacles for expanding current programs, which hui services needed, need for onsite training, current	Dec 1, 2016	The Kohala Center; Project Director; member schools; evaluator

procurement data, current menu plans, opportunities for joint menu planning, and opportunities for joint procurement.		~30 pax
Complete training of hui staff	Dec. 1, 2016	Project Director; hui staff ~5 pax
Create procurement procedures overview and procurement documents templates	Dec 30, 2016	Project Director; hui staff ~2 pax
Create claims and compliance template documents and onsite training manual for NSLP, FFVP and basic procurement procedures	Dec 30, 2016	Project Director; hui staff ~3 pax
Develop pilot joint procurement plan for 1/1/17 – 6/1/17 implementation that includes member schools jointly procuring at least 5% of their federal nutrition program inputs	Dec 30, 2016	Project Director; Procurement Specialist; ~2 pax
Complete training for all member schools regarding on-site implementation of NSLP and FFVP procedures and basic procurement procedures	Feb 30, 2017	Project Director; hui staff; member schools; ~30 pax
For 4 member schools not currently offering federal nutrition programs, co-create plan for implementation of NSLP and FFVP in school year 2016-2017	Feb 30, 2017	Project Director; hui staff; member schools; ~14 pax
For each member school, co-create plan for implementation of NLSP, FFVP, and for half the schools, at least one additional federal nutrition program to be offered in school year 2017-2018	Apr 30, 2017	Project Director; hui staff; member schools; ~30 pax
Develop common lunch menu for adoption by at least 4 participating schools for school year 2017-2018	Mar 1, 2017	Project Director; Menu Planning Consultant; member schools ~30 pax
Develop joint procurement plan for school year 2017-2018 that includes member schools jointly procuring at least 20% of their federal nutrition program inputs	June 1, 2017	Project Director; hui staff ~3 pax
Survey schools regarding common menu areas for improvement and adopt an improved common menu for use by at least 6 schools in school year 2018-2019	Mar 1, 2018	Project Director; Menu Planning Consultant; member schools ~30 pax
For each member school, co-create plan for implementation of NLSP, FFVP, and at least one additional federal nutrition program in school year 2018-2019	Apr 30, 2018	Project Director; hui staff; member schools; ~30 pax
Develop joint procurement plan for school year 2018-2019 that includes member schools jointly procuring at least 30% of their federal nutrition program inputs	Jun 1, 2018	Project Director; hui staff ~3 pax
<p>Intended Outcome 2: Increased participation by low-income charter school students in federal nutrition programs: By July, 2019 student participation in federal nutrition programs in member schools will increase by 40% compared to baseline.</p>		

Activity	Completion Date	Participants/Staff Responsible
Assess current levels of student participation in federal nutrition programs in each member school	Dec 1, 2016	The Kohala Center; Project Director; member schools; evaluator; ~32 pax
For each member school, co-create plan for increasing student participation in federal nutrition programs for implementation in school year 2017-2018	Apr 30, 2017	Project Director; hui staff; member schools; ~00 pax
Assess current levels of participation by students in federal nutrition programs in each member school	Apr 1, 2018	Project Director; member schools; evaluator; ~28 pax
For each member school, co-create plan for increasing student participation in federal nutrition programs in school year 2018-2019	Apr 30, 2018	Project Director; hui staff; member schools; ~30 pax
<p>Project Deliverable: Development of a replication toolkit and supporting data. By July, 2019, a replication toolkit including a development process manual, best practices manuals, accounting procedures manual, document templates, and training materials will be developed. Data relating to reduction of administrative burden as well as cost savings will be collected and analyzed for use in demonstrating project benefits.</p>		
Activity	Completion Date	Participants/Staff Responsible
Survey schools regarding: areas of success in hui implementation; areas for improvement in hui implementation; any additional needs for support in their federal nutrition program implementation	January, 2019	The Kohala Center, Project Director; evaluator ~40 pax
Compile all resources created during hui development and implementation (forms, trainings, templates, manuals) & review for improvement	January, 2019	The Kohala Center, Project Director; ~5 pax
Based on school survey and review of existing materials and evaluation of data collected by NPI, develop draft replication “toolkit” and disseminate draft replication “toolkit” to member schools and hui staff for review and improvement	May 30, 2019	The Kohala Center, Project Director; evaluator; ~7 pax
Complete replication “toolkit”, which will contain all resources necessary to replicate, including a process manual, best practices manual, contract templates, and accounting procedures manual	June 30, 2019	The Kohala Center, Project Director; ~5 pax
<p>Goal 2 Improve food security and community self-reliance by increasing procurement of local agricultural products.</p>		
<p>Intended Outcome 1: Increased procurement by public charter schools of local agricultural products: By July, 2019, member schools will be procuring at least 40% locally sourced food.</p>		
Activity	Completion Date	Participants/Staff Responsible
Gather data from all members schools regarding their current procurement of locally grown food, as a baseline	Dec. 1, 2016	Evaluator; Project Director; hui staff;

data point		member schools; ~33 pax
Survey local producers and distributors to determine which agricultural products are most likely to be local, affordable, and available	Feb 1, 2017	The Kohala Center; hui staff; Hawai'i Island farmers, distributors & food hubs ~60 pax
Chose products from the survey that are compatible with school menus, develop new menu items and recipes, including a common lunch menu that contains at least 25% ingredients that can be procured locally	Apr 15, 2017	Project Director; Menu Planning Consultant; hui staff; member schools; ~33 pax
Develop joint procurement plan for school year 2017-2018 that includes member schools procuring at least 25% locally sourced food	June 1, 2017	The Kohala Center; Project Director; hui staff; ~5 pax
Disseminate a request for proposals to provide the products, publicizing the preference for local sourcing	June 1, 2017	hui staff; ~2 pax
Coordinate menu & procurement planning process with The Kohala Center in order to ensure alignment with their food system and farmer support work.	June 1, 2017	The Kohala Center; Project Director; hui staff; ~5 pax
Survey schools and local producers and distributors for improvement in local sourcing, and develop an improved common lunch menu that contains at least 40% ingredients that can be procured locally	May 1, 2018	Project Director; Menu Planning Consultant; Evaluator; hui staff; member schools; Hawai'i Island farmers, distributors & food hubs ~60 pax
Develop joint procurement plan for school year 2018-2019 with member schools procuring at least 40% locally sourced food	June 1, 2018	Project Director; hui staff ~3 pax
Coordinate menu & procurement planning process with The Kohala Center in order to ensure alignment with their food system and farmer support work.	June 1, 2018	The Kohala Center; Project Director; hui staff; ~8 pax

Evaluation Plan

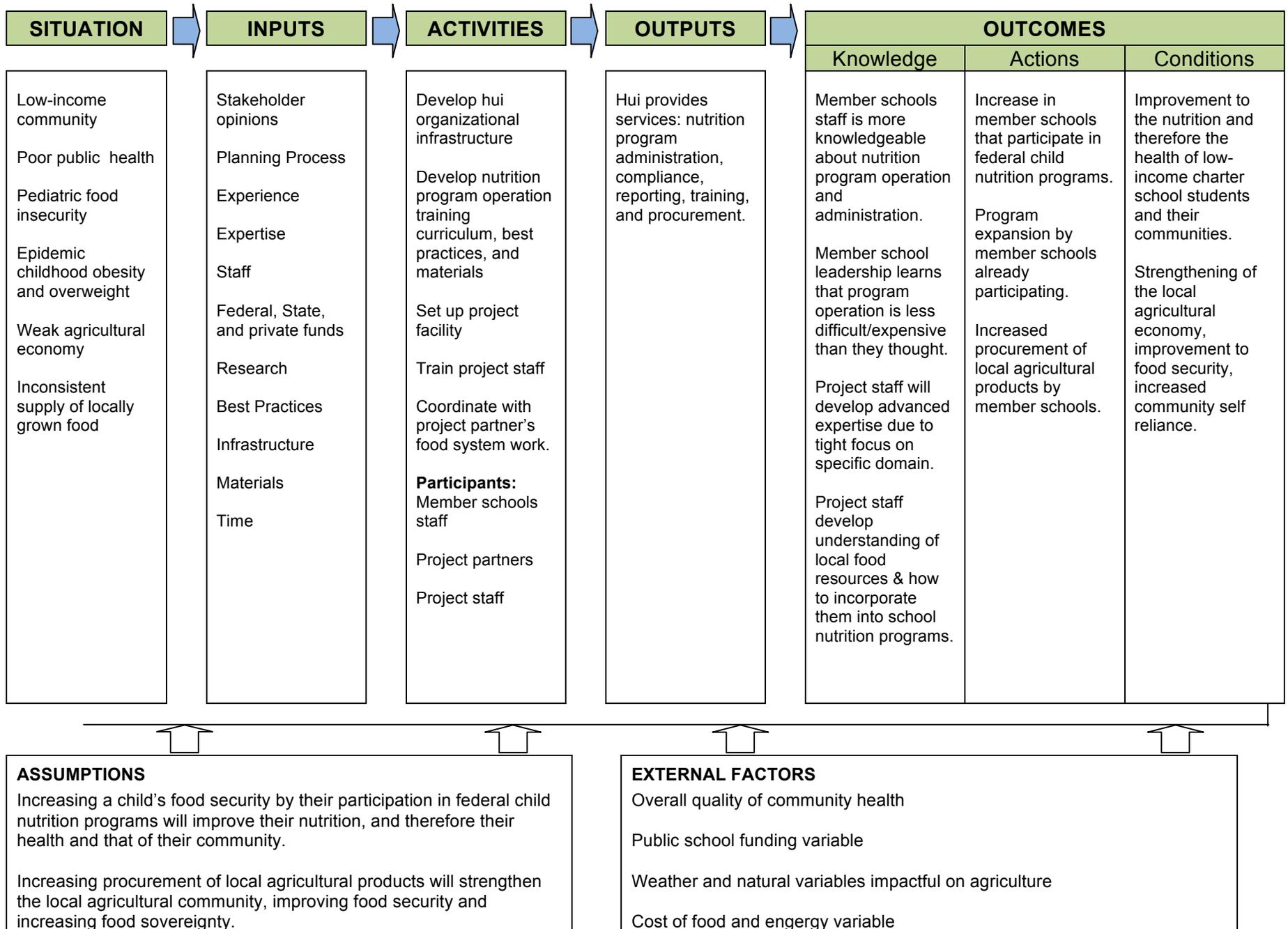
Data analyzed	Data source	When data will be collected	Goal and outcome addressed
Number and % of the 9 schools participating in: <ul style="list-style-type: none"> • National School Lunch Program (NSLP) • Fresh Fruit and Vegetable Program (FFVP) • School Breakfast Program (SBP) • Afterschool Snack Program (ASP) • Summer Food Service Program (SFSP) 	<ul style="list-style-type: none"> • School foodservice administrative records • Interview of school foodservice manager 	Year 1: 10/16 Year 2: 8/17 Year 3: 8/18	Goal 1 Outcome 1: Increase participation by hui <i>schools</i> in federal school nutrition programs
Average daily participation (number and %) of students for: <ul style="list-style-type: none"> • NSLP • FFVP • SBP • ASP • SFSP 	<ul style="list-style-type: none"> • School foodservice administrative records • Interview of school foodservice manager 	Year 1: 10/16-5/17 Year 2: 8/17-5/18 Year 3: 8/18-5/19	Goal 1 Outcome 2: Increase participation by hui school <i>students</i> in federal school nutrition programs
<ul style="list-style-type: none"> • Number and % of schools using common menus • Number and % of items per month per school that are 'common' 	<ul style="list-style-type: none"> • School menu review • Interview of hui administrator 	Two months at start and end of each school year beginning 10/16 and ending 5/19	Goal 1 Outcome 3: Increase use of common menus by hui schools
<ul style="list-style-type: none"> • Number and % of schools using joint procurement • Number and % of federal nutrition program products that are jointly procured 	<ul style="list-style-type: none"> • Interview of hui administrator • Hui procurement records 	Two months at start and end of each school year beginning 8/16 and ending 5/19	Goal 1 Outcome 4: Increase use of joint procurement by hui schools
The following information will be collected on school foodservice administrative costs: <ul style="list-style-type: none"> • % Time spent on school foodservice administration by each school and hui • Annual salary for administrative staff • Food costs • Other procurement costs 	<ul style="list-style-type: none"> • School foodservice and hui administrative records • Interview of school foodservice manager and hui administrator 	Two months at start and end of each school year beginning 10/16 and ending 5/19	Goal 1 Outcome 5: Decrease school foodservice administrative and procurement costs
The following information will be collected on hui purchases: <ul style="list-style-type: none"> • Local grower name • Purchase dates • Dollar value of items purchased • Types of items purchased • Pounds of items purchased • Number and % of ingredients on menu that are locally procured 	<ul style="list-style-type: none"> • Interview of hui administrator • Hui procurement records • School menu review 	Two months at start and end of each school year beginning 10/16 and ending 5/19	Goal 2 Outcome 1: Increase the amount of local agricultural products procured by hui schools

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Hawai'i Charter Schools Foodservice Hui Logic Model



Business Plan Outline

1. Need/Problem

Hawai'i charter school student participation in federal nutrition programs lags behind that of students in Department of Education schools, though charter schools serve a lower-income population. Charter schools either do not participate in federal nutrition programs or offer very limited meals. The schools cite unsustainable costs and the need for high levels of expertise in administering the programs as the reasons they do not participate.

2. Solution

The Hawai'i Charter Schools Foodservice Hui will provide centralized procurement, compliance, training, and nutrition program administration services to member schools. This will lower the cost of program administration, while also eliminating the need for each school to develop the expertise on site. In addition, the hui's procurement activities will allow for increased purchases of locally produced agricultural products, increasing food security and community self-reliance.

3. Business model

The business will be supported by funding from member schools once the three-year startup and development period, which is grant-funded, is completed. During the eighteen month pre-planning process, member schools evaluated their needs and have made firm commitments to financially support the business, as they will save money by doing so compared to conducting the activities themselves.

4. Target market

The target market is charter schools on Hawai'i Island, of which there are seventeen. Nine schools have committed to being fee-paying members of the hui, and we expect more will join once the project is operating.

5. Competitive advantage

Kona Pacific is recognized throughout the state as the leader in child and community nutrition programs, by both the nonprofit and government sectors. Our sterling reputation for successful innovation and program operations means that we are considered the first choice to consult with when dealing with nutrition program development, expansion, and operation. Other charter schools, state agencies, state senators, and the Lieutenant Governor have all approached us and requested our assistance with a diverse range of nutrition and agriculture-related projects. Also, we are first to market with this concept, so face no competition.

6. Management team

Project Director Christopher Hecht will serve as financial officer and manage the business. For information on Mr. Hecht's qualifications, please see the attachment to this proposal titled "Biographical Sketch".

7. Financial summary

Over the three-year project tenure, income and expenditures are both projected to be \$694,279. Personnel costs are the primary expense, accounting for 46% of costs. Startup costs total 17%, operations 22%, and evaluation is 7% of costs. Federal funds supply 39% of income, member school funding 25%, and in-kind support 36%.

8. Funding required

This business is self-sustaining once startup is completed. Federal funding of \$254,977 is requested, for development and startup. After the three-year project period, the business will be funded by member school funding, and generate a small surplus each year. We have chosen not to project any grant funding, though we are aware of federal and private philanthropic programs relevant to the project.

Please see the budget below, which illustrates a typical self-sustaining year of operation without federal funding.

Hawai'i Charter Schools Food Service Hui Self-Sustaining Budget

Inflows		
Member Schools Funding	85,000	Note 1
Grants	-	
In-Kind Support	<u>38,397</u>	Note 2
Total Inflows	<u>123,397</u>	
Outflows		
Personnel		
Accounting	3,500	Note 3
Nutrition Program Ops & Admin Splst.	33,746	
Procurement/Nutrition Program Ops & Admin	33,746	
Fringe Benefits	<u>28,397</u>	Note 4
Total Personnel Outflows	<u>99,389</u>	
Operations		
Bank, Payroll & HR Fees	1,000	
Contingency Fund	1,708	
Data Storage/Offsite Backup	1,000	
Educational Supplies & Materials	1,000	Note 5
Office Facility	10,800	
Office Supplies & Postage	1,000	
Project Staff Professional Development Trave	2,000	
Public Outreach/Membership	500	
Replication Activities & Materials	500	
Travel to Member School Sites for Training	2,000	Note 6
Utilities/Telecommunications	<u>2,500</u>	
Total Operations	<u>24,008</u>	
Total Outflows	<u>123,397</u>	
Inflows less Outflows	<u><u>0</u></u>	

Note 1 Range of \$5,000-\$15,000 per year, depending on # meals & level of services

Note 2 Office of Hawai'i Child Nutrition providing training; Fringe cost for personnel

Note 3 \$25 per hour

Note 4 40% of gross compensation

Note 5 Training of member schools staff by program staff

Note 6 Mileage @ .42 and interisland air

Please see the budget narrative on the following page

Budget Narrative Notes for Selected Items

Inflows

Member Schools Funding will vary based on the amount of services utilized by each school. Currently, there are nine member schools. We believe it is likely that there will be an increase in membership as area schools observe the success of the project. The projected staffing could accommodate as many as twelve schools. To ensure sustainability, we have chosen to use conservative income projections, which are lower than the total funding commitments.

Grant funding has been projected at zero, though we are aware of federal and private philanthropic funding relevant to the project. The project team has extensive success attaining governmental and private grant funding, and it is reasonable to expect that will continue for this project. Area funders have displayed interest in funding replication of the project once it is up and running, which would leverage the success of this project to increase other communities' capacities.

In-Kind Support consists of \$20,000 of training conducted by the Office of Hawai'i Child Nutrition Programs in the areas of nutrition program administration, compliance, reporting, nutrition education, and menu development. The balance of the line item consists of fringe benefit costs for personnel at 40% of gross salary, which are paid by the State of Hawai'i.

Outflows

Nutrition Program Operations & Administration Specialist is one of two full-time program staff positions. The specialist is expert in all areas of federal nutrition program implementation, and provides claiming, compliance, and reporting services for member schools. The specialist also trains member school staff on the program functions that remain site-based, such as food safety, daily counting, and use of the point of sale system. We will leverage the experience and expertise of Kona Pacific's incumbent nutrition program coordinator, who will hold this position, and lead daily operations.

Procurement/Nutrition Program Operations & Administration Specialist is the second full-time program staff positions. In addition to assisting with the duties listed above, this specialist has responsibility for implementing the joint procurement program. The procurement program will reduce food costs, improve the quality and suitability of procured items, and increase the procurement of local products.

Both of these positions will provide a living wage and excellent benefits, supporting the regional economy. Throughout the startup and continuing on an ongoing basis, both employees will receive significant training and professional development that support the employees in attaining important job skills.

Office Facility cost is based on research conducted at the time that this application was prepared, which yielded a lease rate of \$3/year per square foot, with a minimum office size of 300 square feet. Kona Pacific campus construction, due to be completed in summer 2018, will include space to house this office, which will eliminate this expense. In order to be conservative, however, and account for possibly delays in construction, this expense has been included.

Kona Pacific Public Charter School Hawai'i Charter School Foodservice Hui Project Budget

		Grant Funded Period				
		Year 1	Year 2	Year 3	Total	Note
Inflows						
	Operating Inflows					
	Membership Fees	40,000	50,000	83,000	173,000	Note 1
	Total Operating Inflows	40,000	50,000	83,000	173,000	
	Other Inflows					
	Grants - Federal	138,513	77,302	54,562	270,377	Note 2
	In-Kind Support	120,080	55,120	75,702	250,902	Note 3
	Total Other Inflows	258,593	132,422	130,264	521,279	
	Total Inflows	298,593	182,422	213,264	694,279	
Outflows						
	Direct Outflows					
	Startup Outflows					
	Bank, Payroll & HR Setup	500	-	-	500	
	Best Practices Development	7,500	-	-	7,500	
	Computer Hardware & Software	5,000	-	-	5,000	Note 4
	Convening/Facilitation	30,000	-	-	30,000	
	Office Furniture & Fixtures	3,000	-	1,000	4,000	
	Legal Services	40,000	-	-	40,000	Note 5
	Travel to Recruit Additional Member Schools	2,000	1,000	1,000	4,000	Note 6
	Process Manual Creation	3,000	1,000	-	4,000	Note 7
	Project Staff Training	7,000	4,000	3,000	14,000	Note 8
	Shared Recipes/Menus Development	5,000	-	-	5,000	
	Travel to Planning Meetings	-	-	-	-	
	Web Site Development	2,000	-	-	2,000	
	Total Startup Outflows	105,000	6,000	5,000	116,000	
	Ongoing Outflows					
	Personnel					
	Accounting	7,500	5,200	4,160	16,860	Note 9
	Project Director	7,700	7,700	7,700	23,100	Note 10
	Nutrition Program Ops & Admin Splst.	30,000	31,200	32,448	93,648	Note 11
	Procurement/Nutrition Program Ops & Admin	30,000	31,200	32,448	93,648	Note 12
	Fringe Benefits	30,080	30,120	30,702	90,902	Note 13
	Total Personnel Outflows	105,280	105,420	107,458	318,158	
	Operations					
	Bank, Payroll & HR Fees	1,000	1,000	1,000	3,000	
	Educational Supplies & Materials	2,500	2,500	2,500	7,500	Note 14
	Data Storage/Offsite Backup	1,000	1,000	1,000	3,000	
	Office Facility	10,800	10,800	10,800	32,400	Note 15
	Office Supplies & Postage	1,000	1,000	1,000	3,000	
	Project Staff Professional Development Trave	1,250	1,250	1,250	3,750	
	Public Outreach/Membership Materials	1,000	250	250	1,500	
	Replication Activities & Materials	-	5,000	25,000	30,000	
	School Staff Training	13,000	16,000	17,000	46,000	
	Travel to Member School Site for Training	2,000	2,000	2,000	6,000	Note 16
	Travel to PD Meeting	2,100	2,100	2,100	6,300	
	Utilities/Telecommunications	2,500	2,500	2,500	7,500	
	Total Operations	38,150	45,400	66,400	149,950	
	Evaluation					
	Independent Evaluation	24,000	10,000	16,000	50,000	
	Total Evaluation	24,000	10,000	16,000	50,000	
	Total Ongoing Outflows	167,430	160,820	189,858	518,108	
	Total Direct Outflows	261,630	156,020	184,058	601,708	
	Indirect Costs	26,163	15,602	18,406	60,171	Note 16
	Total Outflows	298,593	182,422	213,264	694,279	
	Inflows less Outflows	-	-	0	0	

Kona Pacific Public Charter School Hawai'i Charter School Foodservice Hui Project Budget

- Note 1 Fees range from \$5,000-\$15,000 per year, depending on # meals
- Note 2 Grant funds requested for startup -> Year 3, self-sustaining thereafter
- Note 3 Office of Hawai'i Child Nutrition providing training; Fringe cost for personnel
- Note 4 2 computer workstations, shared printer & scanner
- Note 5 Founding documents, agreements between schools
- Note 6 Includes travel to potential member schools
- Note 7 SOP for sponsoring org. and school-site use
- Note 8 Training in NSLP-compliant procurement, operation, administration
- Note 9 Accounting time reduces once processes are standardized and repeating
- Note 10 .10 FTE during grant-funded period
- Note 11 1 FTE, 4% raise/year
- Note 12 .5 FTE Procure, .5 Ops/Admin, 4% raise/year
- Note 13 40% of gross compensation
- Note 14 Training of school staff by program staff
- Note 15 300 square feet @ \$36.00 per year
- Note 16 10% non-negotiated NIFA rate