Effective Sept 1, 2017

Instructions for completing the SCOPE

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#

# Introduction

Please use this document for examples and further explanations of the items on the SCOPE tool. It is organized by question with the applicable timeframe and documentation suggestions. If there are any requirements that cannot be met, you must seek a waiver. Waivers are considered on a case-by-case basis.

## SCOPE Tool

* Provide your responses electronically using clear, specific, relevant answers on the SCOPE tool.
* Check your answers against the scoring criteria at the end of each section.
* Submit required attachments: directions, organizational chart, I&A form(s), training plans, and survey form(s) with your SCOPE submission.
* Stay within your covered timeframe as indicated in the letter you receive from NCDAAS.

## Documentation

The primary point of the documentation is to show that what you have written on the SCOPE happened the way you described it. Below are some guidelines to follow:

* Fully date, especially the year.
* Organize by question.
* File in same order as is written on the SCOPE tool.
* Cross-reference as needed.
* Have it ready for your AAA to review prior to the site team visit.
* Unless otherwise specified, only one type of documentation is required for each event.
* All documentation should be available onsite during your center’s site visit.

# The SCOPE Questions

## Page 1

* ***Date Tool Submitted***: date SCOPE tool is due at DAAS
* ***Timeframe Covered in the SCOPE:*** determines “SCOPE years” for questions requiring a specific number of instances each year. When “year” is used this means SCOPE year, not calendar or fiscal year.
* ***Certification Training***: A staff person (preferably the senior center manager/director) must attend the certification training at least once every three years and within one year prior to submitting their SCOPE.
* ***Ann Johnson Institute for Senior Center Management***: The center director must begin the Ann Johnson Institute and attend at least one module per year until completed.
* ***AAA Representative’s Signature***: Center must submit completed SCOPE tool to AAA and have all documentation ready for AAA review one month before it is due to DAAS. The SCOPE cannot be submitted without an AAA representative’s signature.

## Page 2

* ***Satellites***: List any satellites included on the official NC Senior Center Directory. Programs and square footage from official satellites can be applied toward certification qualifications. Programs from other remote locations can be applied if planned by center staff and listed on center calendar.
* ***For Centers Applying for Recertification***: List any recommendations from your last certification and indicate how they have been addressed. To be recertified you must have addressed all recommendations or seek a waiver from DAAS as soon as the issue is identified and provide a compelling reason why you have not. Recommendations must begin being addressed immediately after the site visit and changes must remain in place for the entire recertification period.

# Section 1- Services, Publicity and Marketing

A. Information & Referral/Case Assistance

## Questions 1a and b- I&A Procedures and Publicity of Available Services

### Purpose:

To ensure there is a proper system in place to connect participants to local services

### Requirement:

**1a-** Center information and case assistance (I&A) procedures (marked in column B of question 3) must consist of 3 parts:

1. screening or assessment process to determine the consumer’s needs and capacities;
2. linking the consumer to the service;
3. providing follow-up.

**1b-** Center must have a way of informing its participants of all services provided onsite or through I&A.

### Documentation:

Timeframe: Current

* Question 1a: A copy of completed screening tool that includes client’s name, contact information, problem, action, and space for follow-up AND a sample of completed files where I&A was provided with identifying information redacted/concealed
* Question 1b: Fliers, posters, sign-in sheets, or other publicity for all services provided onsite or via I&A

## Question 2- I&R Local and Regional

### Purpose:

To ensure there is a proper system in place to connect participants to regional and national services

### Requirement:

Center must provide information and referral (I&R) to another agency or provider for additional and regional or national services.

### Documentation:

Timeframe: Current

Notebook, computer bookmarks, or brochures of referral sources.

B. Services

## Question 3- Services Offered

### Purpose:

To provide older adults with access to important services

### Requirements:

At least 85% of all available services must be provided onsite or through information and case assistance. Services listed a, b, and c and any additional five services must be offered onsite. Services listed d and e must be available onsite or through I&A. A service is considered onsite if:

* an organization provides service at regularly scheduled intervals in the senior center or on the same campus; or
* service can be enrolled for at the center; or
* service is delivered to participants away from the center, but is arranged and publicized by the center.

### Documentation:

Timeframe: Current

* Calendar, fliers, newsletters or sign-ups for services provided onsite, AND
* List of appropriate service providers, their contact information, and basic eligibility information for services provided via information and case assistance

C. Publicity for the Center and Its Programs

## Question 4- Publicity for the Center

### Purpose:

To inform older adults in the community about the senior center and its programs

### Requirement:

Center must have two types of ongoing publicity.

### Documentation:

Timeframe: Current

Copies of current publicity materials: i.e. brochure, newsletter, newspaper articles or advertisement, correspondence between center, radio or television station regarding announcement/programming

D. Marketing to Special Populations and the Community

## Question 5- Marketing to Special Populations

### Purpose:

To educate potentially/historically underserved people about the senior center and its programs and make it clear to them that they are welcome

### Requirement:

* Center must engage in marketing efforts aimed specifically at target populations to educate them about the senior center and encourage them to attend. The following are the target population groups:
	+ Low-income
	+ Minority
	+ Physically or cognitively impaired (not included in 5% exemption)
	+ Rural
	+ Primary language not English
* Merit- must reach 3 of the populations including low-income and minority.
* Excellence- must reach all 5 groups that represent more than 5% of the senior population.

### Does NOT count:

* Publicity about a specific program the senior center is offering
* Special equipment (i.e. large print or audio books) or programs (i.e. Black History Month events)
* Publicity to populations that probably will not/cannot attend the center
* Advertisements in newspapers or other mass-marketing efforts

### Documentation:

Timeframe: Entire SCOPE period

* Outreach log explaining what was done, when, and what population was the target of the effort AND
* If an email distribution or mailing list is entered in the outreach log, either the list or the log entry must include a description of the population reached by each member of the list.

## Question 6 (Excellence Only)- Training for Nonelderly

### Purpose:

To educate the nonelderly about the needs, interests, or contributions of older adults

### Requirement:

* Center must provide training to people in the community who are younger than the center’s minimum age by teaching them skills or information they need to:
	+ understand issues relevant to older adults; or
	+ improve skills in working with older adults; or
	+ prepare for their own aging.
* Initial- 2 instances
* Recertification- 10 instances, with at least 2 in most recent year

### Examples:

* Hosting a workshop to train social workers, nurses, emergency workers, or other professionals on how to communicate more effectively with older people
* Hosting interns from local colleges. Interns are counted one per semester, per school. Interns from separate schools/departments within the same university (i.e. one intern from the School of Nursing and one from the School of Social Work but both from the same university) count as separate instances.
* Making presentations about aging to elementary, middle, and high schools or college classes
* Holding a training for other senior centers, adult daycare centers, or assisted living facilities on developing activities and programs for older people
* Hosting an update on Medicare and Medicaid regulations for providers who need to understand them
* Presentations from seniors to younger adults or children about life in the past

### Does NOT count:

* Activities held as an event/activity for seniors at your center
* Training provided to other staff who regularly work with older adults at your own center or parent organization
* Responses to spontaneous requests for information

### Documentation:

Timeframe: Entire SCOPE period

* Publicity for events or trainer’s presentation notes or materials AND
* Something to show that the audience was primarily nonelderly if held during the regular hours

# Section 2- Activities, Volunteer Opportunities, Advocacy, and Transportation

A. Activities

## Question 7- Regularly Scheduled Activities

### Purpose:

To ensure sufficient opportunity for consistent participation in senior center activities

### Requirement:

* Center must offer regularly scheduled group activities planned by center staff which are available to anyone.
	+ Merit- 9 regularly scheduled activities per week
	+ Excellence- 15 regularly scheduled activities per week
* Activities must be scheduled throughout center’s operating hours.
* 60% of all scheduled activities must be offered without a required fee. (See DAAS Administrative letter 16-08 for more information.)

### Does NOT count:

* Services, except for fitness classes which also count for health promotion (3b)
* Offsite activities sponsored or planned by other parent agency staff (i.e. nutrition coordinator)
* Duplication of another activity offered at the same time, but different day, to the same group of people

### Documentation:

Timeframe: 3 consecutive months in last year

* Calendars for each month in the 3-month period you selected AND
* Fliers or other announcements if not listed on calendar

## Question 8- Special Events

### Purpose:

To provide special opportunities for senior center participation that are not routinely available

### Requirement:

* Center must offer scheduled events that happen less than monthly, such as one-time or quarterly events or short courses that last no more than 6 weeks (including evidence-based programs):
	+ Merit- 6 in last year required for initial certification, 30 total for recertification with at least 5 in last year
	+ Excellence- 10 in last year required for initial certification, 50 total for recertification with at least 8 in last year
* Special events are included when calculating 60%.

### Documentation:

Timeframe: Entire SCOPE period

* Fliers, calendars, or another form of publicity or
* Attendance sheets

## Question 9- Drop-in Activities

### Purpose:

To provide unscheduled, unstructured opportunities for senior center participation

### Requirement:

Center must offer informal activities and equipment that consumers can use that are not scheduled for a set period. These must be available without a fee or via scholarship for those unable to pay.

### Examples:

* Fitness center
* Computer lab
* Cards, jigsaw puzzles, and games (each counted separately)
* Walking trail
* Library

### Does NOT count:

Individual appliances (i.e. TV, coffee pot, scales) or pieces of furniture

### Documentation:

Timeframe: Current year

Observed onsite.

## Question 10- Diversity

### Purpose:

To ensure the senior center serves a diverse population of older adults

### Requirement:

Center must reach a diverse population of older adults.

### Documentation:

Timeframe: Current

Observed onsite.

B. Opportunities for Volunteers

## Question 11- Volunteer Census and Activities

### Purpose:

To provide older adults with volunteer opportunities that benefit the center and community

### Requirement:

Volunteers must be engaged in at least one activity that benefits the center and one that benefits the community.

### Documentation:

Timeframe: Current

Roster or mailing list/phone list of center volunteers

## Question 12- Volunteer Recognition

### Purpose:

To ensure all senior center volunteers receive recognition for their efforts and encourage their continued service

### Requirement:

All center volunteers must be recognized annually. You may acknowledge different groups of volunteers in different ways if all volunteers are recognized annually.

### Documentation:

Timeframe: Entire SCOPE period

Invitations, event program, pictures, fliers, newspaper article, correspondence, or attendance sheets

## Question 13 (Excellence Only)- Volunteer Plan

### Purpose:

To have a plan in place for staff to understand essential aspects of the center’s volunteer program

### Requirement:

Center must have a *single document* that addresses all four sections of this question:

* List volunteer opportunities at the center, how many people are needed, and descriptions for each type of opportunity.
* Describe procedures for orienting and training volunteers and keeping them involved. Describe volunteer manuals or other written materials used to train volunteers, along with any specifics about orientation or training policies, frequency of training, etc.
* Describe the ways in which the center informs the community about volunteer opportunities at the center (i.e. fliers, newspaper, newsletter, etc.).
* Describe the ways in which the center informs participants about opportunities in the community Include information about how you post external opportunities received from outside organizations and/or volunteer opportunities that take place at the center but benefit people outside the center (i.e., making lap robes for people in nursing homes or delivering meals).

### Does NOT count:

Volunteer manual intended for volunteers

### Documentation:

Timeframe: Current

* Single-document volunteer plan containing all four required sections
* Evidence that what is described in sections (c) and (d) of the plan is occurring as described

C. Advocacy

## Question 14- Advocacy

### Purpose:

To protect the rights of older adults and empower them to stand up for their own rights

### Requirements:

* Must demonstrate action initiated by center staff to:
	+ Lead older adults to advocate for themselves; or
	+ Fight system to remedy injustice; or
	+ Act on behalf of older adult(s), beyond normal case assistance, to change situation or policy.
* Initial- 3 instances
* Recertification- 15 instances with at least 3 in most recent year

### Examples:

* Senior Tar Heel Legislative delegate or alternate speaking and *soliciting input* from participants
* Candidates forum with question and answer period
* Voter registration
* Serving on a non-aging related committee to advocate for older adults
* Phone calls, letters, email, visits on behalf of a cause
* Class about advocacy skills- *must involve practice or role playing*

### Does NOT count:

* Normal case-assistance
* Information-only presentation or event
* Regular job responsibilities (i.e. funding request to county commissioners)
* Activity by some of your seniors that did not have center’s involvement
* Bulletin board or advocacy corner of information without resulting action
* Advocacy skills class without practice or role playing
* Duplication of effort toward a single issue within a single year
* Medicare Part D annual open enrollment or scam events after January 1, 2016
* Advocacy efforts sent to grant providers rather than elected officials or local representatives

### Documentation:

Timeframe: Entire SCOPE period

Copies of letters sent, written attestation statements verifying phone calls made by participants, screenshots of emails sent, advocacy class training materials, fliers or other publicity announcing elected official/STHL delegate visit with the opportunity to give input or express concerns

## Question 15- Elder Abuse Policy

### Purpose:

To be prepared to handle suspected cases of elder neglect, abuse, or exploitation

### Requirement:

Must have a written procedure for reporting suspected elder neglect, abuse, or exploitation.

### Documentation:

Timeframe: Current

Copy of policy

D. Transportation to the Center

## Question 16- Transportation to the Center

### Purpose:

To encourage the participation of seniors who do not drive

### Requirement:

Must have at least one means of transportation to the center must be available for those that do not drive.

### Documentation:

Timeframe: Current

None needed if observed onsite

# Section 3- Planning, Evaluation, and Input from Older Adults

A. Governance

## Question 17- Mission Statement

### Purpose:

To have principles that provide guidance for center planning

### Requirement:

Center must have a mission statement. If a center is under an umbrella organization, center should come up with its own mission statement or statement of purpose.

### Documentation:

Timeframe: Current

Observe mission statement posted AND in center publications as described.

## Questions 18a and b- Advisory Committee and Orientation

### Purpose:

To broaden the spectrum of programming ideas and ensure older adults are represented when making programmatic decisions

### Requirements:

**18a-** The center must have an advisory committee recruited from the center and the community who advise the director in planning the center’s services, programs, and activities to meet the needs of the community. 60% of members must be older adults.

**18b-** Members beginning service within the SCOPE period must be oriented within two months of their first meeting.

### Documentation:

Timeframe: 18a: current; 18b: entire SCOPE period

**18a**- Roster, meeting minutes with names of those present and absent, or mailing list

**18b**- Minutes showing who attended the orientation sessions or attestations confirming orientation with dated signatures from any advisory members who joined the committee within the SCOPE period

## Question 19- Advisory Orientation Content

### Purpose:

To provide advisory committee members with a thorough understanding of operations of the senior center

### Requirement:

Centers must offer at least two hours of orientation to advisory committee members. Topics must include:

* the philosophy of the center (i.e. discussion of the mission and purpose of the center);
* legal issues (i.e. liability, confidentiality);
* policy (i.e. advisory body by-laws, center’s handbook);
* the political environment in which the center operates (i.e. how center fits into community, relationships with other governing boards, chain of command for decision-making); and
* the financial environment in which the center operates (i.e. authorization, funding).

### Documentation:

Timeframe: Current

* Orientation agenda AND
* Supporting materials (handouts, notebooks, presentations) or a detailed description/speaker notes of information covered in the orientation

B. Input from Older Adults

## Questions 20a, b, and c- Input from Older Adults

### Purpose:

To ensure the center programs meet the needs and interests of current participants and other older adults in the community

### Requirements:

**20a-** Center must gather input from a representative, broad cross-section of its *participants* each year using a survey that is available to all center participants and captures two types of information:

* Participants’ overall satisfaction with the center AND
* Participants’ service needs and activity preferences to be used for planning.

**20b-** Center must have a *second measure of participant input* each year. This second method can be less formal and less representative, but it must be made *available* to all center participants. If activities from satellites are included in the SCOPE tool, this second measure should also be available and advertised to satellite participants.

### Examples:

* Food with the director event to discuss center programs and participant preferences.
* Focus groups that include open-ended questions asked the same way to all groups.
* Suggestions boxes or conversations with participants. Efforts by governing bodies, parent organizations, or area planning groups to obtain information from seniors in the community, if information is gathered that is useful for planning services and activities for the center and it is used for senior center planning.

**20c-** At least one of the following two types of information must be gathered from older adults who do NOT attend the senior center *(nonparticipants)*:

* Reasons for not attending
* Activities and/or services that would attract them to the center

If the same survey is used multiple times in a single year, it counts as one survey.

You can use the same survey for participants and nonparticipants if you include question that will allow you to separate the answers and analyze the results separately. Make sure that nonparticipants are clearly directed to skip to only those questions relevant to them.

### Does NOT count:

* Surveys about specific programs rather than the entire center
* Participant surveys which are only administered at satellites, to select groups (i.e. nutrition program participants), or a few individual classes rather than to a representative sample of all center participants
* Suggestion boxes with no or little usage after one year

### Documentation:

Timeframe: Entire SCOPE period

**20a-** a final summary report for each survey used. Must include:

* Date(s) administered
* Number of people who responded
* Tally of responses for each question
* What you learned
* What action was taken

If the same survey was administered at separate sites (satellites, nutrition sites, or other centers under the same parent organization), the reports should separate out the tally and results for each.

**20b-**

* If a second survey is used, the documentation requirements are as listed in 20a.
* Oral suggestions/food with director/suggestion box: include an ongoing record of input received from center and satellite participants (if applicable) and brief notes about the center’s response to input, if not clearly described on the SCOPE tool.

**20c-** Appropriate documentation based on method used, as listed above. If the same method was used for participants and nonparticipants, the results for each group must be analyzed separately.

## Question 21 (Excellence Only)- Input from Other Sources

### Purpose:

To encourage staff to utilize a wide variety of input for planning

### Requirement:

Center must describe input used for planning that does *not* come directly from older adults.

### Examples:

* Input received from attending other aging service provider meetings about community needs
* Input from surveys or focus groups of allied service providers about the center’s services/programs
* Attendance data for classes and events
* Formal or informal suggestions from your staff, members of your parent organization, or the regional or state level
* Suggestions received from training

### Documentation:

Timeframe: Current year

Records that correspond with response in SCOPE tool

C. Planning

## Question 22 (Excellence Only)- Planning Process

### Purpose:

To encourage thoughtful and deliberate planning

### Requirement:

Center must describe planning process and how goals for the center are set.

### Documentation:

Timeframe: Current

No documentation required if description is adequate.

## Question 23 (Excellence Only)- Goals

### Requirement:

Center must have goals for the center that are currently in effect and, if applicable, consistent with goals submitted to the parent organization, funding organization, or other bodies requiring the center to set goals.

### Documentation:

Timeframe: Current

Minutes of meetings in which the goals were established, or in which staff gave reports on progress toward goals, or director/staff log of progress on work toward meeting goals

# Section 4- Staff

A. General Personnel Practices

## Question 24- Personnel Policy

### Purpose:

To ensure a professional work environment with clear policies and procedures

### Requirement:

Center must have a clear organization chart and a written personnel policy that includes such information as leave, retirement, and benefits. Each employee must be provided with a copy or have an opportunity to read the policy.

### Documentation:

Timeframe: Current

* Copy of the center’s organization chart AND
* Personnel policy in the form in which it is distributed to employees (i.e. handbook, policy manual)

B. Individual Training and Professional Development Planning

## Question 25- Staff Training Records

### Purpose:

To ensure appropriate professional development for senior center staff

### Requirements:

* Center director must have 15 hours of training for initial certification and 75 hours of training for recertification with 12 hours in the most recent year. If full time is 37.5 hours/week, the requirement remains 15 hours per year.
* Center director or manager must begin the Ann Johnson Institute for Senior Center Management during the first year of employment and must attend a minimum of one module per year until completed.
* Full time staff who work for more than 3 months, who interact with center participants, and who the director recruits, hires, trains, and supervises must receive an average of 15 hours of training per year and 75 hours total with 12 hours in the most recent year. Title V employees and parent agency employees who do not work at the center or one of its satellites are exempt from training requirements.
* Executive staff who actively participate in the running of the senior center should have relevant amount of training prorated by the number of hours allotted to the senior center.
* Part and partial time employees who meet the criteria listed above for full time staff and work more than 8 hours per week for more than 3 months must receive a prorated amount of 15 hours of training. See below for more guidance. Employees who work less than 8 hours per work or less than 3 months are exempt from training requirements.
	+ Part-time: multiply the number of hours per week by 15, then divide the product by 40.
	+ Partial time: multiply the number of months worked by 15, then divide the product by 12.
* Training content must cover one of three topics:
	+ Aging issues
	+ Job related topics
	+ Safety

For initial certification or first year employees, staff must receive training in 2 of these areas within the past year. For recertification, employees must receive training in all 3 areas if they worked more than one year.

* Training method must be specified.
* Training received from participating on a SCOPE site team will count as 5 hours of training on “job related topics” unless you have documentation from DAAS showing the site visit lasted longer.

### Examples:

* An employee who works 20 hours per week needs (20 X 15)/40 or 7.5 hours of training each year.
* A full-time employee who only worked for 9 months would need (9 X 15)/12 or 11.25 hours.
* A part-time, recently hired employee who worked 15 hours/week for only 6 months would need (15 X 15)/40 hours or 5.625 of training per year and therefore (6 X 5.625)/12 or 2.8 hours for 6 months.

### Documentation:

Timeframe: Entire SCOPE period

Certificates of attendance, training materials, training confirmations, agendas, notes taken, or site visit letters for all employees employed at least 8 hours a week for 3 or more months during certification period, regardless of whether they are currently employed

## Question 26 (Excellence Only)- Training Plans

### Purpose:

To encourage communication and deliberateness about staff training needs as it relates to fulfilling the center’s mission and achieving center and professional development goals

### Requirements:

* Training plans aimed at enhancing professionalism and skills must be developed annually in consultation between the employee and supervisor.
* Plans must include an explanation of what training the employee will take, why it is important, and possible training sources. Plans will rarely be an exact match of actual training received.
* Plans must be signed and dated by both the employee and supervisor.

### Documentation:

Timeframe: Entire SCOPE period

Annual training plans for past and current employees for each year employed and for the year to come

# Section 5- Other Operational Issues

## Question 27- Collaborations

### Purpose:

To maximize senior center capacity through well-defined collaborations

### Requirement:

* Merit- centers must have ongoing or specific collaborations within the most current SCOPE year (initial) or past 5 years (recertification) with at least 3 other organizations per year. This does not include contracts with other entities involving payment for products or services.
* Excellence- there must be 3 or more annual collaborations with signed and dated Memoranda of Understanding or letters of agreement between the collaborating organizations which explain the roles and expectations of both parties. If center has ongoing, multiyear agreement with an organization, it can count as *one agreement* *per year* if inclusive years are listed in agreement.

### Does NOT count:

* Contracts (Note- If center has a contract with an agency but has a separate collaboration that is not for pay, it can count. For example, a center cannot count a contract with a local college to provide an instructor, but *can* count a collaboration with the same college for intern placement.)
* Partnerships within own agency or network (DAAS, AAA, other senior centers)
* Partnerships involving payment or funding for service (i.e.- if center receives SHIIP funding, it *may not* count SHIIP as a partner in this question; but if a center provides SHIIP counseling, and *does not* receive SHIIP funding, it *can* count the collaboration.)
* Facility use agreements without clear, nonfinancial benefit to the center

### Documentation:

Timeframe: Entire SCOPE period

* Merit: informal documentation such as a flier for an event that shows co-sponsorship, an email exchange discussing partnered event, or a calendar listing that mentions an outside provider
* Excellence: formal memoranda of understanding (MOUs) or letters outlining the responsibilities and agreement from both parties and signed and dated by both. Agreements may cover multiple years, but the time span covered by the agreement should appear explicitly in the text of the document.

## Question 28- Hours of Operation

### Purpose:

To ensure minimum senior center operations standards are met and to maximize the opportunity for participation.

### Requirement:

Center must be open full-time and hours must be posted so they may be seen from outside of the main entrance.

### Documentation:

Timeframe: Current

Hours posted onsite

## Question 29 (Excellence only)- Extended Hours

### Purpose:

To provide participation opportunity for those who may have other obligations during traditional hours

### Requirement:

Center must offer extended hours or have plans to do so in the future, or demonstrate a failed attempt to offer additional hours within the SCOPE period.

### Documentation:

Timeframe: Current

* Regular extended hours posted on door as listed above
* Schedules, newsletters, fliers showing after-hour events
* Copies of memos or other materials showing efforts if there is a plan to extend hours
* Attendance data demonstrating lack of success if center tried extended hours within the SCOPE time frame and did not receive response sufficient to warrant continued efforts
* Copies of correspondence, policy manual, or relevant statute if city/county owns building and does not permit additional hours or there are other insurmountable obstacles

## Question 30- Compliance with Local Code

### Purpose:

To ensure general safety inside the senior center

### Requirement:

Centers must be in compliance with local codes.

### Documentation:

Timeframe: Current

Current sanitation certificate, fire inspection report, elevator inspection (if applicable)

## Questions 31 and 32- Upkeep and Accessibility

### Purpose:

To ensure a well-maintained senior center facility

### Requirements:

Center must have a plan for the upkeep of the center and grounds to assure safety and neat appearance as well as features that make it accessible to people with disabilities.

### Documentation:

Timeframe: Current

No documentation required.

## Question 33 - Center Space

### Purpose:

To ensure minimum senior center operations standards are met

### Requirements:

Center must be a minimum of 4000 square feet, of which 3200 must be used for center programming. See Policies & Procedures for more information about how to count offsite space for meeting the space requirement.

### Documentation:

Timeframe: Current

* Initial- blue prints, letter from building inspector, deed, mortgage/rental agreement, or drawing with measurements shown for each dimension.
* Recertification- none needed if situation has not changed since last certification.

## Question 34- Signage

### Purpose:

To inform older adults in the community about the senior center and to make it easy to find

### Requirement:

Center must have a sign identifying it by name that is visible from the nearest road.

### Documentation:

Timeframe: Current

Observed onsite.

## Questions 35a and b- Fundraisers and Grants

### Purpose:

To expand the capacity of the senior center by expanding its sources of revenue.

### Requirements:

* Initial certification- centers must engage in at least 2 fundraising and/or grant activities in the last year. In-kind donations which were actively solicited by staff counts as a type of fundraiser. Submitting a grant application counts toward this requirement even if it was not funded.
* Recertification- centers must engage in at least 10 fundraising and/or grant activities with at least 1 in the last year.
* Fundraisers and grants must benefit programs that are *provided by the senior center* rather than another agency, including the parent agency. Funds raised may be divided between multiple centers within your agency or between the parent organization and the center.
* If a center is part of government or agency with policies against fundraising, the center should show evidence of working to expand funding in permitted ways.

### Does NOT count:

Routine, noncompetitive funding, even if you are required to fill out an application for it

### Documentation:

Timeframe: Entire SCOPE period

Copies of grant proposals, letters from funders, advertisement for fundraisers, financial reports, copies of checks or receipts

## Questions 36 and 37 (Excellence Only)- Financial Reporting

### Purpose:

To protect against financial mismanagement

### Requirements:

**36-** Centers must produce an annual financial report and an audit (if applicable), or be included in the annual financial report of the parent organization’s or local government’s financial report.

1. Centers must have a means of letting participants know how access to the center’s annual financial report or audit and the ability to provide a copy of the report at the center if requested.

### Documentation:

Timeframe: Current

**36-** Copy of annual financial statement, fiscal report, and audit report if applicable

**37-** Materials publicizing statement availability, observed onsite if publicized on a bulletin board

# Section 6- The Extra Mile (Excellence Only)

## Questions 38- Special Projects

### Purpose:

To encourage centers staff to exceed certification requirements in unique and innovative ways

### Requirements:

Centers must actively engage in special projects throughout certification period.

### Documentation:

Timeframe: Entire SCOPE period

Corresponding pictures, publicity documents, correspondence, sign-up lists, and/or agreements with project collaborators

## Question 39- Mentoring

### Purpose:

To encourage centers staff to share knowledge and ideas with other NC senior center professionals

### Requirements:

Center staff must mentor other senior center professionals from outside their own agency.

### Documentation:

Timeframe: Entire SCOPE period

Thank-you letters, site visit confirmation letters, listserv correspondence

## Question 40- Summary Statement

### Purpose:

To give staff the opportunity to summarize why the center should be center a Center of Excellence.

### Requirements:

Center should provide a statement demonstrating the pursuit of Excellence in efforts to fulfill its mission.

### Documentation:

Timeframe: Current

No documentation required

#

# Appendix

List of Common Mistakes

**Section 1- Services, Publicity, and Marketing**

* Failing to publicize all services listed in columns A and B (Q 1b)
* Confusing education/referral with assistance (Q 3)
* Offering programs for special populations instead of targeted marketing (Q 5)
* Listing mass-marketing instead of *targeted* marketing (Q 5)
* Listing education about the center instead of education about older adults (Q 6)

**Section 2- Activities, Volunteer Opportunities, Advocacy, and Transportation**

* Leaving out one of the four requirements for volunteer plan (Q 13):
	+ List/describe volunteer opportunities at center & how many are needed
	+ Describe procedure for orientation, training & retention
	+ Explain how volunteers are solicited for center
	+ Describe how center participants are made aware of volunteer opportunities in community
* More issues with volunteer plan (Q 13):
	+ Not having information in a single-document
	+ Mistaking volunteer manual for volunteer plan
	+ Not being detailed enough that if director left, new person could understand & provide continuity
	+ Not including info on confidentiality & performance evaluation in orientation (2nd element- procedure for *orientation,* training & retention)
	+ Not understanding question is about ways center informs participants about volunteer opportunities *outside of center/in communi*ty (4th element- how center participants are made aware of volunteer opportunities *in the community*)
* Counting things that are not advocacy as defined by SCOPE: (Q14)
	+ Center wasn’t involved in some way
	+ The event was information only
	+ It was an example of case-assistance
	+ It was “business as usual”/job responsibilities
	+ Staff was advocating without involving older adults (ok if done sparingly)

**Section 3- Planning, Evaluation, and Governance**

* Leaving out one of requirements for advisory committee orientation (Q 19)
	+ philosophy of center
	+ legal issues
	+ policy
	+ political environment
	+ financial environment
* Using suggestion box as secondary method of getting participant input for all 5 years, but it is rarely used (Q 20)
* Reporting other kinds of input from older adults instead of input/data NOT from older adults (Q 21)

**Section 4- Staff**

* Training records not available onsite (Q 25)
* Training plans (Q 26):
	+ Not completed ahead of time
	+ Timeframe not specified
	+ Not signed by employee AND supervisor

**Section 5- Other Operational Issues**

* Messing up MOUs (Q 27)
	+ Including inappropriate agreements
		- Contracts for money
		- AAA or other natural partners
	+ Not specific enough about what each party agrees to do
	+ Time period not included
	+ Missing signatures/dates of signatures
* Counting fundraisers or grants that do not directly benefit the center (Q 35)
* Not making the financial statement available at the center (Q 37)

**Section 6- The Extra Mile**

* Not providing appropriate documentation for special projects (Q 38)

Description of Services (Question 3)

***General description of how to count services involving application assistance:***

If a staff person or volunteer can help someone with an online application or a representative from another agency comes to the center and can help people enroll, it goes in Column A. If a staff person can help participants make an appointment to apply for services provided by another agency offsite, it goes in Column B.

***Services:***

1. **Health screening:** preliminary assessments or examinations to detect the most characteristic sign or signs of a disorder that may require further investigation
2. **Fitness and health promotion**: opportunities for participants to maintain or improve their health through fitness programming, education, vaccinations, etc. *Evidence-based programs are encouraged. These activities may also be listed in section 2A*.
3. **Counseling about insurance**: Counseling about health insurance options. *Insurance counseling from an independent source such as SHIIP, not a private insurance company. It is sufficient to provide space for older adults to meet with the SHIIP counselors on a regular basis.*
4. **Tax preparation/counseling**: assistance completing tax forms and/or counseling about tax issues.
5. **Legal services**: legal counseling from an independent source such as Legal Aid of North Carolina
6. **General transportation:** transportation provided for essential needs such as grocery shopping, errands, or trips to a nutrition site. Does not include transportation for recreational trips.
7. **Medical transportation**: transportation provided for medical appointments.
8. **Support groups or classes for caregivers**: support or education for participants facing unique challenges. *Caregivers’ classes may be counted both here and in Question 6 if the sessions include an educational component in addition to support and you market them to people who are younger than your center’s age criterion. Support groups may be counted as both services and activities (Q. 7 or 8) if they include a social component in addition to instruction or therapy/group discussion.*
9. **Housing assistance**: assistance locating and securing desired housing accommodation.
10. **Reverse mortgage counseling**: counseling for a specific type of mortgage in which a homeowner can borrow money against the value of his or her home and receive funds in the form of a fixed monthly payment or a line of credit. The NC Housing Finance Agency provides information about the program and maintains a statewide list of certified reverse mortgage counselors. You must use the state’s certified reverse mortgage counselors for assistance.
11. **Home repair/modification**: repairs or modifications made to improve the condition of an existing home.
12. **Home health/in-home aide**: assistance with independent activities of daily living and activities of daily living in a client’s home. Might also include health care monitoring, physical, occupational, and speech therapies and other doctor order health services.
13. **Medicaid benefits**: assistance applying for the joint federal and state program that helps with medical costs for some people with limited income and resources.
14. **Medicare parts A&B**: assistance enrolling in the federal health insurance program for people who are 65 or older. *SHIIP counseling does not count for this question unless the counselor can help a person apply for benefits onsite or assist with a problem in obtaining benefits.*
15. **Medicare part D**: assistance enrolling in the prescription drug plan. *You may count this in Column A if your center aids during the annual Part D enrollment period.*
16. **Social Security benefits:** assistance enrolling people in the federal program designed to provide income for retirement.
17. **Job training**: training to provide the necessary skills and education to find or retain employment. Available through organizations such as community colleges, JobLink Career Centers, the internet, federally subsidized employment such as the Senior Community Service Employment Programs (Title V/Senior Aide), etc. *Senior centers which are host sites for Title V/Senior Aide workers can list this in Column A.*
18. **Job placement:** assistance obtaining employment. Assistance with placement may be provided by the center or through programs such as the Title V Program; JobLink Career Centers; Employment Security Commission offices; or directly through local employers. *Having Title V workers counts as job training, not job placement. If Title V is run by your center or parent agency, it can count as job placement.*
19. **Congregate meals**: a meal, typically lunch, which offers one third of the recommended daily dietary allowance, in a group setting.
20. **Home-delivered meals**: a meal, typically lunch, to homebound individuals which offers one third of the recommended daily dietary allowance.
21. **Adult day care/day health**: program which offers mental, social, and physical activities for adults who have lost some independence due to cognitive impairments or chronic health conditions.
22. **Mental health:** counseling and support for persons facing mental or emotional challenges
23. **Disaster preparedness training**: education and other support needed to be prepared in the event of a disaster. *Center should offer at least one educational session per year to seniors about how to prepare for and seek help before and after a disaster and about any local services that may exist to assist older adults before, during, or after a disaster (i.e. special needs registries, special needs shelters, or disaster relief services targeting older adults).*
24. **Durable medical equipment/assistive devises**: nonexpendable articles to be primarily used for medical purposes in cases of illness or injury or any device designed or adapted to help people with physical or emotional disorders to perform actions, tasks, and activities.
25. **Long-term care facilities/AAA ombudsman:** assistance locating a facility that provides rehabilitative, restorative, and/or ongoing skilled nursing care or assistance for residents in need of aid with activities of daily living and connecting residence or their family members with AAA ombudsman staff trained to assist in exercising residents’ rights and resolve grievances between residents, families, and facilities.
26. **Rehabilitation services**: treatment offered by allied health professionals which are designed to facilitate the process of recovery from injury, illness, or disease to as normal a condition as possible.
27. **Respite**: assistance which enables caregivers to be temporarily relieved from their caregiving responsibilities
28. **Senior Games**: competitive program for adults 50 and older*. If participants can enroll at the senior center, you can count in column A.*
29. **Telephone reassurance:** regular personal or telephone contact for older persons who are homebound or live alone.
30. **Energy assistance:** assistance with utility costs or relief from extreme temperatures.
31. **Food distribution:** food for those who are in need.

Sample I & A Resource List (Question 3)

|  |  |
| --- | --- |
| **Type of service**Description- *use if you need to describe the service you provide through I & A.* | Eligibility: *use this space to describe eligibility requirements. This will allow staff to provide screening for the service.* Procedure: *use this space to describe the specific steps a staff person would take if a person was seeking this service. It should include things like intake procedure, how to apply, what to do with intake information received, when to follow up, etc.*Contact: *use this space to provide contact info such as who to call, a local contact, appropriate phone numbers, email addresses, etc. This could be combined with procedure info if preferred.* |
| **Adult day care/day health**Description | Eligibility: Procedure:Contact: |
| **Congregate meals**Description | Eligibility: Procedure:Contact: |
| **Disaster preparedness, planning or response**Description | Eligibility: Procedure:Contact: |
| **Durable medical equipment/assistive devices**Description | Eligibility: Procedure:Contact: |
| ***Examples:*** |
| **Home health services** | **Eligibility:** Services are provided when they are medically necessary to help treat, restore, rehabilitate, or sustain a patient in the home. Physician orders required for services. Patient must meet company’s guidelines to qualify.**Procedure:** Complete an intake form with all relevant information. Offer to provide list of providers or assist with contact if needed. Provide follow up within 2 weeks.**Contact:** Current provider list [www.homeandhospicecare.org/directory](http://www.homeandhospicecare.org/directory). Use this list to identify individual agencies to call. |
| **Home repair/modification***Weatherization program helps low income individuals make their home more energy efficient.* | **Eligibility:** Must own home or have landlord who agrees to program rules. Income eligibility. Refer to chart.**Procedure**: Complete application with all relevant information. Assist as needed. Give application to John Doe. Provide follow up within 2 weeks.**Contact:** (XXX) XXX-XXXX |
| **Home-delivered meals** | **Eligibility:** Must be 60 years old and live in XXX County. Must be within X miles of current route.**Procedure**: Complete intake form with all relevant information and give to agency’s nutrition coordinator for an assessment. Provide follow up within 2 weeks.**Contact:** Nutrition Coordinator at (XXX) XXX-XXXX |

Sample Outreach Log (Question 5)

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Non-applicable** | **What was done? What was distributed? How was it distributed? Where was it distributed?** | **Date of Distribution** | **SCOPE Year 1** | **SCOPE Year 2** | **SCOPE Year 3** | **SCOPE Year 4** | **SCOPE Year 5** |
| **Low-income** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **Ethnic minorities** |
|  |  | *Distributed 30 newsletters by mail to African American churches in the county.* | *1/25/16* | *X* |  |  |  |  |
|  |  | *Spoke at 5 African American churches within city limits about senior center and handed out newsletters and calendars.* | *3/12/17* |  | *X* |  |  |  |
| **Rural** |
|  | X |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **Physical or cognitive impairments** |
|  |  | *Dropped off 40 newsletters to social worker for the blind.*  | *1/25/16* | *X* |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **Primary language not English** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

Sample List for Volunteer Needs (Question 13a)

|  |  |
| --- | --- |
| ***Need*** | ***Personnel requirement*** |
| To cover 5 routes for home-delivered meals (10 clients per route) | 11 drivers, 5 for MWF, 5 to cover T-Th and 1 to provide back-up |
| To staff the reception desk over the lunch hour | 1 or 2 volunteers willing to spend an hour and a half on alternate days. |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Methods of Input: Descriptions and Tips (Question 20)

**Focus groups:**

Focus groups are a specific information-gathering technique used by both market research and social science. They are not easy to do well. There should be a set of predetermined questions that will be asked in the same way to all groups. Unlike survey questions, these will all or almost all be open-ended questions. Plan to use multiple small groups (6 to 10 people each) to get an accurate response. The people within each group should be similar, but the separate groups should represent different types of people who could use the center and who may have different opinions about the questions you want them to answer based on the these differences.

**Food with the director:**

This informal method involves a conversation about how things are going in the center and what changes participants would like to see, what problems need to be resolved, etc. The director needs to keep a record of issues that come up and actions taken.

**Oral suggestions:**

This informal method of getting input is much more passive than the others since suggestions are not solicited. However, careful logging of oral suggestions can result in valuable planning information. The oral suggestions should be logged in a systematic fashion (i.e. log sheet, suggestions, dated received, response).

**Public meetings or hearings:**

These generally have only one or two suggested topics or questions. Attendees are encouraged to talk about whatever is important to them about senior centers. Their statements are recorded and used in planning programs and marketing.

**Suggestion boxes:**

For suggestion boxes to be effective there should be pencil and paper readily available and close-by. Blank suggestion forms instead of paper work well. Some centers have found it helpful to post or publicize received suggestions and the center’s responses.

**Surveys:**

Surveys are the best way to get satisfaction information. If you want to use the same survey for participants and nonparticipants, be sure that you ask a question that will allow you to separate the answers and be sure that you look at the results separately and compare them to each other. Make sure that non-participants are clearly directed to skip to answer only those questions relevant to them.

Sample Participant Survey (Question 20 a)

**[Name of Center] Senior Center Interest and Satisfaction Survey**

*Please complete this survey if you usually attend the [name of center] at least once a month.*

1. How long have you been coming to this senior center?

|  |  |
| --- | --- |
| * Less than once year
 | * 1 to 5 years
 |
| * 6 to 10 years
 | * 10 years or more
 |

1. About how often, in the past year, have you come to the senior center?

|  |  |
| --- | --- |
| * Less than once a month
 | * 1 to 3 times a month
 |
| * 1 time per week
 | * 2 to 4 times a week
 |
| * 5 times a week or more
 |

1. For each of the statements below check “Yes,” Sometimes,” or “No” to indicate whether or not it is true for you.

|  |  |  |  |
| --- | --- | --- | --- |
| **Because I go to the Senior Center, I . . .** | Yes | Sometimes | No |
| Do more volunteer work | 🞎 | 🞎 | 🞎 |
| Know where to ask if I need a service, such as a ride to the doctor or an aide  | 🞎 | 🞎 | 🞎 |
| Have more energy | 🞎 | 🞎 | 🞎 |
| Eat meals that are better for me | 🞎 | 🞎 | 🞎 |
| See friends more often**/**make new friends | 🞎 | 🞎 | 🞎 |
| Take better care of my health | 🞎 | 🞎 | 🞎 |
| Learn new things | 🞎 | 🞎 | 🞎 |
| Am more physically active | 🞎 | 🞎 | 🞎 |
| Have something to look forward to | 🞎 | 🞎 | 🞎 |
| Feel happier or more satisfied with my life | 🞎 | 🞎 | 🞎 |
| Feel more able to stay independent | 🞎 | 🞎 | 🞎 |
| Feel that the senior center has had a positive effect on my life | 🞎 | 🞎 | 🞎 |
| Would recommend the senior center to a friend or family member | 🞎 | 🞎 | 🞎 |

1. How would you rate the overall programs and services at [name of senior center]?

|  |  |
| --- | --- |
| * Excellent
 | * Good
 |
| * Fair
 | * Poor
 |
| * Unsatisfactory
 |

**Over** 🡺

1. [Name of senior center] is considering adding the following activities or programs in the next [time frame for new activities]. For each one, please check one box to indicate whether you would be interested in doing this at the center.

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Very Interested** | **Might be Interested** | **Not Interested** |
| a. [first activity] | 🞎 | 🞎 | 🞎 |
| b. [second activity] | 🞎 | 🞎 | 🞎 |
| c. [third activity] | 🞎 | 🞎 | 🞎 |
| d. [fourth activity] | 🞎 | 🞎 | 🞎 |

1. Please list any new ***fitness activities*** you would like to have at the center:
2. Please list any new ***arts or crafts classes/activities*** you would like to have at the center:
3. Please list any ***speakers or educational programs*** you would like to have:
4. Please list any new ***social/recreational activities*** you would like to have:
5. Please list any ***trips or special events*** you would like the center to consider.
6. Please list any ***new equipment*** you would like the center to consider purchasing:
7. What is your favorite thing about coming to the center?

**Thank You!
Your Opinions Are Very Important to Us.**

Sample Nonparticipant Survey (Question 20c)

**[Name of Center] Senior Center Community Survey**

*Please complete this survey if you are more than \_\_\_ years old, live in \_\_\_\_\_\_\_\_, and do not take part in activities and programs at [name of senior center]*

1. Have you ever been to the [name of senior center]?

|  |  |  |
| --- | --- | --- |
| * No
 | * Yes, a few times
 | * Yes, but not for a long time
 |
| * Yes, I have been to the center 10+ times in the past year 🡺 *Please do not continue the survey*
 |

1. What are the reasons that you do not attend the [name of center] regularly? (Check all that apply).

|  |  |
| --- | --- |
| * I do not know much about it
 | * I do not know where it is
 |
| * I do not have transportation
 | * I do not think anything there would interest me
 |
| * I do not know anyone who goes there
 | * I am caring for someone who is sick or has a disability
 |
| * I am still working
 | * I am caring for grandchildren or other children
 |
| * I am too busy
 | * Other {Please specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
 |

1. [Name of senior center] *is considering adding* the following activities or programs in the next [time frame for new activities]. For each one, please check one box to indicate whether you would be interested in doing this at the center.

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity [fill these in with *things you want to try]*]** | **Very Interested** | **Might be Interested** | **Not Interested** |
| a. [first activity] | 🞎 | 🞎 | 🞎 |
| b. [second activity] | 🞎 | 🞎 | 🞎 |
| c. [third activity] | 🞎 | 🞎 | 🞎 |
| d. [fourth activity] | 🞎 | 🞎 | 🞎 |

1. The senior center ***currently offers*** the following activities (among others). For each one, please check one box to indicate whether you would be interested in doing this at the center.

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity [fill these in with *your* popular activities]** | **Very Interested** | **Might be Interested** | **Not Interested** |
| 1. [popular fitness activity at your center]
 | 🞎 | 🞎 | 🞎 |
| 1. [popular arts/crafts activity at your center]
 | 🞎 | 🞎 | 🞎 |
| 1. [dances, line dancing, or ballroom dance—if in your center]
 | 🞎 | 🞎 | 🞎 |
| 1. Information about services you or family members need
 | 🞎 | 🞎 | 🞎 |
| 1. [computer, tablet, or smart phone or help-- if you offer]
 | 🞎 | 🞎 | 🞎 |
| 1. [list another popular drop in or scheduled activity]
 | 🞎 | 🞎 | 🞎 |

1. Please list any services or activities that would make you decide to come to the center. (You may write on the back if you need more room.)

**Thank You!
Your Opinions Are Very Important to Us.**

Sample Training Plan (Question 26)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **What** | **How much** | **From Whom** | **Why** | **By when** | **Category** |
| Ann Johnson Institute for Senior Center Management, Module 4, Planning and Evaluation | 15 hours | Division of Aging and Adult Services | To continue work toward completing the 6 modules; to develop new ways to link evaluation of current programs to development of new ones. | When that module is offered this year | Aging and Job Specific |
| Blood-borne diseases | 2 hours | Health Department(offered alternate months) | To review latest standards in reducing risk of infection for self and participants | End of training year | Safety |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| Employee Signature |  | Supervisor Signature |
|  |  |  |
| Date  |  | Date  |

Sample Memorandum of Understanding (Question 27)

**Memorandum of Understanding between**

**<INSERT SENIOR CENTER NAME>**

**and**

**<INSERT PARTNER NAME>**

This MEMORANDUM OF UNDERSTANDING is hereby made and entered into by and between the <insert partner name>, hereinafter referred to as COLLABORATOR and <insert senior center name>, hereinafter referred to as SENIOR CENTER.

**PURPOSE:**

The purpose of this MOU is to continue to develop and expand a framework of cooperation between COLLABORATOR and the SENIOR CENTER to <insert purpose of collaboration>.

**SENIOR CENTER SHALL:**

* <insert agreed upon commitments here, adding more bullets as needed>

**COLLABORATOR SHALL:**

* <insert agreed upon commitments here, adding more bullets as needed>

**IT IS MUTUALLY UNDERSTOOD AND AGREED BY AND BETWEEN THE PARTIES THAT:**

* MODIFICATION: Modifications to this agreement shall be made by mutual consent of the parties, by the issuance of a written modification, signed and dated by authorized officials, prior to any changes being performed.
* TERMINATION: Either party, upon thirty (30) days written notice, may terminate the agreement in whole, or in part, at any time before the date of expiration.
* PRINCIPAL CONTACTS: The principal contacts for this agreement are:

COLLABORATOR**:**

<Insert name of responsible person from partner agency, phone number, email address>

SENIOR CENTER:

<Insert name of responsible senior center staff person, phone number, email address>

* COMMENCEMENT/EXPIRATION DATE: This agreement is executed as of the date of last signature and is effective through **<**insert end date> at which time it will expire unless extended.
* LIABILITIES: It is understood that neither party to this Memorandum of Understanding is the agent of the other and neither is liable for the wrongful acts or negligence of the other. Each party shall be responsible for its negligent acts or omissions and those of its officers, employees, agents or students (if applicable), howsoever caused, to the extent allowed by their respective state laws.

**Authorization:**

The signing of this Memorandum of Understanding is not a formal undertaking. It implies that the signatories will strive to reach the objective(s) stated above. In witness whereof, the parties hereto have executed this agreement as of the last written date below.

|  |  |  |
| --- | --- | --- |
| FOR COLLABORATOR: |  | FOR SENIOR CENTER: |
| <Insert responsible party’s name, title> |  | <Insert responsible party’s name, title> |
| (Date) |  | (Date) |

Documentation for 5-Year Recertification

All the information in this table can be found, question by question, in the SCOPE tool. It is condensed in this table for your convenience. All 5-year and 1-year periods count backwards from the date on the upper right of the cover sheet in the “Date Tool Submitted” block. This is the last day of your SCOPE years.

Although site visitors will generally review all the documentation listed below, there may be special circumstances where the team decides to look at a sample of what you provide for a given question. In any case, ***you must have available all the required documentation for each year,*** because you will not know what sample will be drawn. That will be decided, randomly, on the day of the site visit.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Question** | **5 Year** | **1 Year** | **Now** | **None needed** | **Center Needs to Document** | **What site visitors will look at** |
| *Recommendations* | X |  |  |  | Depending on recommendation, we will expect to see implementation (or good progress) made shortly after previous SCOPE visit and continued/maintained throughout the 5 years. | Every year for every recommendation, as applicable. *You cannot be recertified unless you can show you made and maintained the recommended improvements.* |
| **Section 1. Services, Marketing, Publicity** |
| **Question** | **5 Year** | **1 Year** | **Now** | **None needed** | **Center Needs to Document** | **What site visitors will look at** |
| *Question 1*I & A Procedures and Publicity |  | X |  |  | System for connecting people to services | Copy of completed screening tool, sample of completed files where I&A was provided with identifying information redacted and fliers, posters, sign-in sheets, or other publicity for all services in columns A and B |
| *Question 2*I&R Local and Regional |  |  | X |  | Ability to provide I&R for regional and national services | Notebook, computer bookmarks, or brochures of referral sources. |
| *Question 3*Services Offered |  | X |  |  | Evidence of services provided onsite, evidence of system for providing services via I&A | Calendar, fliers, newsletters or sign-ups for services provided onsite, List of appropriate service providers, contact info, and basic eligibility information for services provided via I&A |
| *Question 4*Publicity for the Center |  |  | X |  | 2 ways of publicizing center | Copies of current publicity materials |
| *Question 5*Marketing to Special Populations | X |  |  |  | At least one effort to each required group each year | Outreach log explaining what was done, when, and what population was the target of the effort list and description of the population reached by each email or mailing lists |
| *Question 6* Training for Nonelderly(Excellence only) | X |  |  |  | 10 in the past 5 years, at least 2 in the most recent SCOPE year | Publicity for events or trainer’s presentation notes or materials and something to show that the audience was primarily nonelderly if held during regular hours |
| **Section 2. Activities, Volunteer Opportunities, Advocacy, and Transportation** |
| **Question** | **5 Year** | **1 Year** | **Now** | **None needed** | **Center Needs to Document** | **What site visitors will look at** |
| *Question 7*Regularly Scheduled Activities |  | X\* |  |  | 9 regular activities for Merit, 15 for Excellence | Calendars for each month of prespecified 3-month period\* in most recent year; fliers or other announcements if not listed on calendar |
| *Question 8* Special Events | X |  |  |  | 30 special events in the past 5 years, at least 5 in the most recent SCOPE year (Merit) or 50 in the past 5 years, at least 8 in the most recent SCOPE year (Excellence). Remember *not* to include services in this list. Can list up to 15/year. | Fliers, calendars, or another form of publicity or attendance sheets |
| *Question 9* Drop-in Activities |  |  |  | X |  |  |
| *Question 10* Diversity |  |  |  | X |  |  |
| *Question 11* Volunteer Census and Activities |  |  | X |  | Active volunteer base | Roster or mailing list/phone list of center volunteers |
| *Question 12*Volunteer Recognition | X |  |  |  | Annual recognition of all volunteers | Invitations, event program, pictures, fliers, newspaper article, correspondence, or attendance sheets |
| *Question 13*Volunteer Plan(Excellence only) |  |  | X |  | Single-document volunteer plan covering 4 required components | Volunteer plan and evidence that what is described in sections (c) and (d) of the plan is occurring |
| *Question 14*Advocacy | X |  |  |  | 15 in last 5 years, at least 3 of which have occurred in the previous 12 months | Copies of letters sent, written attestation statements verifying phone calls, screenshots of emails, advocacy class training materials, fliers or other publicity announcing elected official/STHL delegate visit with the opportunity to give input or express concerns |
| *Question 15*Elder Abuse |  |  |  |  | Current written procedure for reporting suspected abuse, neglect and exploitation | Copy of policy |
| *Question 16* Transportation to the Center |  |  |  | X |  |  |
| **Section 3. Planning, Evaluation, and Input from Older Adults** |
| **Question** | **5 Year** | **1 Year** | **Now** | **None needed** | **Center Needs to Document** | **What site visitors will look at** |
| *Question 17*Mission Statement |  |  | X |  | Use of current mission statement | Posted mission statement and included in publications if so described. |
| *Question 18*Advisory Committee and Orientation |  |  |  |  | Properly oriented advisory committee | Roster, meeting minutes with names of those present and absent, or mailing list and minutes showing who attended the orientation sessions or attestations confirming orientation with dated signatures from any advisory members who joined the committee *within the SCOPE period* |
| *Question 19*Advisory Orientation Content |  |  | X |  | Orientation materials covering all five required components | Orientation agenda and supporting materials (handouts, notebooks, presentations) or detailed description or speaker notes of information covered in the orientation |
| *Question 20*Input from Older Adults | X |  |  |  | From participants:*Merit***:**1 annual measure of *satisfaction*, *needs and interests* (5 total).*Excellence*: 1 annual measure of satisfaction, needs and interests. 1 other annual measure (10 total).From nonparticipants:*Merit***:** 1 every 3 years (this could be 1 or 2 during the 5-year period)*Excellence*: 1 annual measure (5 total) | Final summary report for each survey used with:* Date(s) administered
* Number of people who responded
* Tally of responses for each question
* What you learned
* What action was taken

Oral suggestions/food with director: include an ongoing record of input received from center and satellite participants (if applicable) and brief notes about the center’s response to input, if not clearly described on the SCOPE tool |
| *Question 21*Input from Other Sources |  |  | X |  | How other sources are used for planning | Records that correspond with response in SCOPE tool |
| *Question 22*Planning Process*(Excellence only)* |  |  |  | X |  |  |
| *Question 23*Goals*(Excellence only)* |  |  | X |  | How goals were set or how they are being used | Minutes of meetings in which the goals were established, or in which staff gave reports on progress toward goals, or director/staff log of progress on work toward meeting goals |
| **Section 4. Staff** |
| **Question** | **5 Year** | **1 Year** | **Now** | **None needed** | **Center Needs to Document** | **What site visitors will look at** |
| *Question 24*Personnel policy |  |  | X |  | Appropriate personnel documents | Copy of the center’s organization chart and personnel policy in the form in which it is distributed to employees (i.e. handbook, policy manual) |
| *Question 25*Staff Training Records | X |  |  |  | For all current and staff-Fulltime: 15 hours of training for initial certification and 75 hours of training for recertification with 12 hours in the previous yearPart and partial time: Prorated  | Certificates of attendance, training materials, training confirmations, agendas, notes taken, or site visit letters for all employees employed at least 8 hours a week for 3 or more months during certification period, regardless of whether they are currently employed. |
| *Question 26*Training Plans*(Excellence Only)* | X |  |  |  | Training plans for all present and past employees | Provide training plans for the previous year (initial) or 5 years (recertification), as well as plan for the coming year for all employees. Provide plans used with former employees on staff during last 5 years, as well. |
| **Section 5. Other Operational Issues** |
| **Question** | **5 Year** | **1 Year** | **Now** | **None****Needed** | **Center Needs to Document** | **What site visitors will look at** |
| *Question 27*Collaborations | X |  |  |  | For Merit, evidence of collaboration with 3 organizations each yearFor Excellence, formal evidence of collaboration with 3 per year | Merit: informal documentation such as a flier for an event that shows co-sponsorship, an email exchange discussing partnered event, or a calendar listing that mentions an outside provider Excellence: formal memoranda of understanding (MOUs) or letters outlining the responsibilities and agreement from both parties and signed and dated by both |
| *Question 2*8Hours of Operation |  |  | X |  | Visibly posted full-time hours | Hours posted onsite and visible from outside the center. |
| *Question 29*Extended hours*(Excellence only)* |  |  | X |  | Extended hours of operation or evidence of attempts to offer extended hours | Posted on door or in recent schedules, newsletters, fliers showing after-hour eventsCopies of memos or other materials showing efforts if there is a plan to extend hoursAttendance data demonstrating lack of success if center tried extended hours within the SCOPE time frame and did not receive response sufficient to warrant continued effortsCopies of correspondence, policy manual, or relevant statute if city/county owns building and does not permit additional hours or there are other, insurmountable obstacle |
| *Questions 30*Compliance with Local Code |  |  | X |  | Current compliance with local codes | Current sanitation certificate, fire inspection report, elevator inspection (if applicable |
| *Question 31*Upkeep |  |  |  | X |  |  |
| *Questions 32*Accessibility |  |  |  | X |  |  |
| *Question 33*Center Space |  |  | X\* |  | For initial: a minimum of 4000 square feet, of which 3200 must be used for center programming. \**No evidence needed for recertification if building/space has remained the same.* | Blue prints, letter from building inspector, deed, mortgage/rental agreement, or drawing with measurements shown for each dimension. |
| *Question 34*Signage |  |  | X |  | A sign identifying center by name that is visible from the nearest road | Sign(s) |
| *Questions 35*Fundraisers and Grants | X |  |  |  | Initial certification- 2 fundraising and/or grant activities in the last year Recertification- at least 10 fundraising and/or grant activities with at least 1 in the last year | Copies of grant proposals, letters from funders, advertisement for fundraisers, financial reports, copies of checks or receipts |
| *Questions 36-37*Financial Reporting*(Excellence only)* |  |  | X |  | Annual financial reporting with audit (if applicable) and availability of report to participants | Copy of annual financial statement, fiscal report, and audit report (if applicable) and materials publicizing statement availability, observed onsite if publicized on a bulletin board |

|  |
| --- |
| **Section 6. The Extra Mile** |
| **Question** | **5 Year** | **1 Year** | **Now** | **None****Needed** | **Center Needs to Document** | **What site visitors will look at** |
| *Question 38* Special Projects*(Excellence only)* | X |  |  |  | All special projects mentioned in the SCOPE | Corresponding pictures, publicity documents, correspondence, sign-up lists, and/or agreements with project collaborators |
| *Question 39*Mentoring*(Excellence only)* | X |  |  |  | All mentoring mentioned in the SCOPE | Thank-you letters, site visit confirmation letters, listserv correspondence |
| *Question 40*Summary Statement*(Excellence Only)* |  |  |  | X |  |  |

Mid-Point Review Checklist

**Recommendations from last certification site visit**

[ ] center is addressing recommendations made in the most recent DAAS certification letter.

**Section 1: Services, Publicity, and Marketing**

*Services*

Merit and Excellence

[ ] services meet 85% service requirement

[ ] I&R or better available for all services listed except those not provided locally

[ ] services a- c provided onsite

[ ] services d and e provided onsite or through I&A

Excellence only:

[ ] systematic way to inform people about services in Columns A and B

[ ] five or more services onsite, or enrollment for services from services f to ee.

*Case Assistance*

Merit and Excellence: Center has:

[ ] case assistance tool

[ ] I&A system

[ ] 2 forms of publicity (min.)

*Marketing*

*Special* marketing efforts, on-going or at least once/yr. for each required population:

[ ] Merit: low income, minority, and one other group from list

[ ] Excellence: all 5 groups listed if the older adults in a group represent at least 5% of older adults in the community (centers must market to groups with disabilities, regardless of their number in the community)

*Excellence only: Training and outreach for others*

[ ] trainings on aging issues for non-senior audiences, averaging 2/yr.

**Section 2: Activities, Volunteer Opportunities, Advocacy, and Transportation**

*Activities*

Regularly scheduled

[ ] 9 for Merit

[ ] 15 for Excellence

Special activities *averaging* annually

[ ] 6/yr. for Merit

[ ] 10/yr. for Excellence

Drop-in activities

[ ] 3 or more used by 10% of average daily attendance (min.)

Overall activities from 3 categories above

[ ] at least 2 activities in each of the 4 activity types from any of the categories

[ ] programs and facilities planned for diversity

[ ] 60% of regular and special events are free, all drop-ins available to those who cannot pay

*Volunteers*

[ ] volunteers engaged in 1 activity to benefit center; 1 to benefit community

[ ] annual volunteer recognition

[ ] Excellence only: single-document written volunteer plan covers all 4 areas

*Advocacy*

[ ] advocacy activities averaging 3/yr.

[ ] policy for reporting suspected elder neglect, exploitation, or abuse

*Transportation*

[ ] transportation *to the center* available

**Section 3: Planning, Evaluation, and Input from Older Adults**

*Mission and Advisory Body*

[ ] center ensures that employees, volunteers, and participants know mission statement

[ ] 60% of advisory body members meet center’s definition of older adult

[ ] advisory group members oriented within 2 months of beginning service

[ ] orientation materials cover required topics; documentation of 2-hour orientation session

*Input from Older Adults*

Merit

[ ] participants: 1 annual measure of needs, interest, and satisfaction

[ ] nonparticipants: at a minimum, center will have 1 every three years

Excellence

[ ] participants: 1 annual measure of needs, interest, and satisfaction

[ ] participants: 1 other annual method of gaining information

[ ] nonparticipants: 1 annual method

[ ] 1 other way of gaining information for planning *other than* input from older adults

*Planning*

[ ] Excellence only: a clear planning procedure

[ ] Excellence only: written goals that are specific, measurable, attainable, realistic, and time-limited

**Section 4: Staff**

[ ] meets personnel policy requirement

[ ] paid, full-time director during recertification period

[ ] all staff members receive an average of at least 15 hrs. training annually, prorated for length of service and/or percentage of full time

[ ] training covers all 3 topic areas within 5 yr. period

[ ] director/manager has begun the Ann Johnson Institute during first year of employment and future participation is evident, at least one annually

[ ] directors/managers have attended certification training at least once every three years

[ ] Excellence only: staff members have annual training plans that meet requirements

**Section 5: Other Operational Issues**

*Collaboration*

* Merit: documented collaboration with 3 organizations annually or on-going
* Excellence: letter or memorandum of understanding (MOU) with 3 organizations annually.

*Facility*

[ ] center open 40 hrs./week with hours visible outside at entrance

[ ] Excellence only: *regular* extended hours (or documentation of why they aren’t offered)

[ ] compliance with local codes

[ ] plan for regular upkeep

[ ] center accessible to people with disabilities

[ ] meets square footage requirements

[ ] center marked outside;

*Financial*

[ ] 2 annual fundraisers, grant applications, or other methods of increasing resources

Excellence only

[ ] produces annual financial report

[ ] advertises and can make above report available

**Section 6: The Extra Mile (**Excellence only)

[ ] center has at least one appropriate activity/project for Q38

[ ] center has appropriate mentoring and/or technical assistance for Q39

[ ] center should be able to describe in writing the value of the center in the community (why it should be a Center of Excellence)

**Site Visit Activities (team will check during site visit)**

[ ] contact information and scheduling posted for services listed in columns A and B

[ ] availability of drop-in activities and transportation to the center

[ ] mission statement prominently displayed

[ ] posting or documentation of compliance with local codes

[ ] well-maintained grounds and interior

[ ] accessibility features

[ ] ***documentation for all SCOPE answers*:** AAA might review appropriate documentation with the center. Refer center to documentation requirements/suggestions in “*Instructions for the SCOPE and the Documentation*” or “*Documentation for 5-year Recertification”.*

5-Year Checklist

| **SCOPE Question (examples of valid documentation)** | **Year Since Certification** |
| --- | --- |
| **1** | **2** | **3** | **4** | **5** |
| Center is addressing all recommendations made in the most recent DAAS certification letter. |  |  |  |  |  |
| **Section 1: Services, Publicity and Marketing** |
| Q1a. Center regularly uses a case assistance tool.  |  |  |  |  |  |
| Q1b. The center informs people about all services listed in columns A and B. |  |  |  |  |  |
| Q2a-b. Center has an ongoing method for providing I&R for state or national services.  |  |  |  |  |  |
| Q3. 85% of services are provided with assistance or better.  |  |  |  |  |  |
| Q3. Services are a.-c. provided onsite. |  |  |  |  |  |
| Q3. Services are d-e in column A or B. |  |  |  |  |  |
| Q3. *Excellence only:* The center offers 5 additional services (or enrollment for services) onsite from f through ee.  |  |  |  |  |  |
| Q4. Center has at least two of the marketing products listed in the SCOPE. |  |  |  |  |  |
| Q5. Special marketing, ongoing or at least once a year, to required populations present in the area (5% or more). (There is no minimum percentage for people with disabilities.) Merit: low income, minority, and one otherExcellence: all 5 groups |  |  |  |  |  |
| Q6. *Excellence only*: Center provides training on aging issues for non-senior audiences, averaging 2 per year. |  |  |  |  |  |
| **Section 2: Activities, Volunteer Opportunities, Advocacy, and Transportation** |
| Q7. Regularly scheduled activities*For Merit*: 9*For Excellence*: 15(over a 3-month period in the most recent SCOPE year. For centers certified at merit wishing to be considered for excellence, the increase to 15 must be documented for 1 year preceding the site visit.  |  |  |  |  |  |
| Q8. Special activities*For Merit*: Averaging 6 per year *For Excellence*: Averaging 10 per year(For centers certified at merit wishing to be considered for excellence, the increase to 10 must be documented for 1 year preceding the site visit.) |  |  |  |  |  |
| Q9. Drop-in activitiesObserved onsite. |  |  |  |  |  |
| Q7, 8, and 9. Documented activities in each category (regular, special, drop-in) should include at least 2 for each of 4 categories: Social, Educational, HPDP, Arts. 60% of regular and special activities free. Drop-ins available for those who cannot pay. |  |  |  |  |  |
| Q10. Explain how activities are planned for diverse audiences. |  |  |  |  |  |
| Q11. The center should offer at least one volunteer activity that benefits the center and at least one that benefits the community.  |  |  |  |  |  |
| Q12. A volunteer recognition activity for each year. (Events may be documented in Q8). |  |  |  |  |  |
| Q13. *For Excellence*: Centers must document a written plan for the use of volunteers that includes a description of the opportunities; procedure for orientation, training, and retention; method by which volunteers were recruited; and method by which volunteers were informed of activities outside the center.  |  |  |  |  |  |
| Q14. Centers must document an average of 3 advocacy activities per year.  |  |  |  |  |  |
| Q15. The center has a written procedure for reporting suspected abuse, neglect and exploitation. |  |  |  |  |  |
| Q16 There is at least one means of transportation to the center. Observed onsite. |  |  |  |  |  |
| **Section 3: Planning, Evaluation and Input from Older Adults** |
| Q17. The center ensures that employees, volunteers, and participants know the mission statement. |  |  |  |  |  |
| Q18a. Sixty percent of the center’s advisory body meets the center’s definition of older adult.  |  |  |  |  |  |
| Q118b. New advisory group members are oriented within 2 months of beginning service.  |  |  |  |  |  |
| Q19. Orientation materials cover the required areas.  |  |  |  |  |  |
| Q20. Input from older adults*For Merit*: 1 annual measure for participants;1 method of getting input from nonparticipants at a minimum of every 3 years.*For Excellence*: 1 annual measure for participants1 other annual method of gaining information from participants1 annual method of gaining information from nonparticipantsFor centers certified at merit wishing to qualify at excellence, the standard for excellence must be met for the final year of the certification period. |  |  |  |  |  |
| Q21. *For Excellence*: One method of gaining information for planning other than feedback from any group of older adults. |  |  |  |  |  |
| Q22 and 23. *For Excellence*: Centers must demonstrate a clear planning procedure that includes short- and long-term goals. Goals should be specific, measurable, attainable, realistic, and time-limited. |  |  |  |  |  |
| **Section 4: Staff** |
| Q24. Personnel receive or have the opportunity to review a written statement of personnel policy.  |  |  |  |  |  |
|  |  |  |  |  |  |
| Q 25. 1. There is a training record for each person employed during the certification period, whether or not he/she is employed at the time of the recertification visit.
2. Each employee is receiving average of 15 hours of training annually (prorated by length of service and part-time status).
3. During certification period, each employee will have training in all three topic areas: aging, safety, job-specific.
4. A director/manager has begun the Ann Johnson Institute within the first year of employment and future participation is evident.
 |  |  |  |  |  |
| Q267 *For Excellence*: Each employee has a written training plan for each year of certification and one for the coming year—6 plans.  |  |  |  |  |  |

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| **Section 5: Other Operational Issues** |
| Q27. Collaboration with other organizations*For Merit*: Documented collaboration with 3 organizations per year. *For Excellence*: Collaboration documented with memoranda of understanding (MOU) or agreement: 3 organizations per year.  |  |  |  |  |  |
| Q 28. Center has been open 40 hrs/week during the recertification period. |  |  |  |  |  |
| Q 29. *For Excellence*: Center has offered extended hours throughout the recertification period or can document why not. |  |  |  |  |  |
| Q 30. The center has documented compliance with relevant local codes.  |  |  |  |  |  |
| Q 31. The center has a plan for regular upkeep. |  |  |  |  |  |
| Q 32. The center is accessible to people with disabilities. |  |  |  |  |  |
| Q 33. The center meets the square footage requirements, overall (4000 sq ft) with 3200 sq ft for participants’ use. |  |  |  |  |  |
| Q 34 The center has a sign identifying the center. |  |  |  |  |  |
| Q 35 a and b. The center has engaged in 2 fundraising activities each year where allowed, or engaged in other efforts to extend resources. |  |  |  |  |  |
| Q36 and 37. *For Excellence*. The center has produced an annual financial report, advertised it, and made it available to participants. |  |  |  |  |  |
| **Section 6: The Extra Mile (For Excellence Only)** |
| Q 38. The center can document at least one innovative project or mentorship it has provided during the 5-year period. |  |  |  |  |  |
| Q 39. The center has provided mentoring throughout the 5-year period.  |  |  |  |  |  |
| Q 40. The answer should describe clearly the value of the center to the community, how it is fulfilling its mission, and why it should be considered a center of excellence. |  |  |  |  |  |

Contact Information

|  |  |  |  |
| --- | --- | --- | --- |
| ***Organization*** | ***Name*** | ***Email*** | ***Phone*** |
| ***Division of Aging and Adult Services (DAAS)*** | Leslee Breen | Leslee.Breen@dhhs.nc.gov  | 919-855-3414 |
| Rebecca Freeman | Rebecca.Freeman@dhhs.nc.gov | 919-855-3421 |
| Steve Freedman | Steve.Freedman@dhhs.nc.gov | 919-855-3411 |
| For more information use the link to the right. | <https://www.ncdhhs.gov/assistance/adult-services/senior-centers>  |
| ***UNC CARES*** | Mary Anne Salmon | masalmon@email.unc.edu  | 919-962-4362 |
| ***Area Agencies on Aging (AAAs)*** | For specific contact information use the link to the right. | <https://www.ncdhhs.gov/assistance/adult-services/area-agencies-on-aging>  |